Carter Jonas

Guildford Retail and Leisure Study Update *2014*:

FINAL REPORT

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Guildford Retail and Leisure Study Update 2014

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1.0 INTRODUCTION

1.1 Carter Jonas (CJ) (incorporating Strategic Perspectives) was commissioned by the Guildford Borough Council in 2014 to carry out a comprehensive update of the 2011 *Guildford Retail & Leisure Study Update* (2011 GRLSU).

AIM & SCOPE OF WORK

1.2 The main aim of the study is to provide detailed information on the likely future need ('capacity') and demand for new retail floorspace over the development plan period (to 2033), and to assess the requirements for other town centre uses, specifically commercial leisure uses[1].

1.3 Advice and recommendations are provided on future retail and leisure needs in existing centres; focusing on Guildford Town Centre, and the Borough's two District Centres (Ash and East Horsley). The study also considers the need for retail and leisure uses to support the proposed planned housing in the draft Local Plan Strategy and Sites document, as well as the potential need for a new foodstore in the Borough. The study findings supersede the 2011 GRLSU.

1.4 By way of context, although Guildford town centre serves an important role as the largest centre in terms of retail floorspace in Surrey, it is facing strong competition from neighbouring centres where significant new retail and leisure developments are in the pipeline (Section 4). The Borough's two district centres and the numerous smaller local centres also serve important functions and help to meet local everyday needs.

1.5 According to the most recent population forecasts[2] published by the Office of National Statistics (ONS), the Borough's population is expected to increase by 14% over the development plan period (2014-2033). This will place increased demand for services in the Borough's main centres; particularly on retail and leisure provision.

1.6 Against this background, this study will provide the robust and up-to-date evidence needed by Guildford Borough Council to inform the preparation of its new Local Plan documents. This includes the draft Local Plan Strategy and Sites, which will define town centre boundaries and identify and allocate sites to meet any identified need for new retail, leisure and commercial development over the development plan period.

1.7 The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the *National Planning Policy Framework* (NPPF) published in March 2012. Where relevant the study also draws on advice set out in the *National Planning Practice Guidance* (NPPG), published in March 2014. The NPPG still places significant weight on

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[1] In accordance with the Council's Brief the main leisure uses considered are Class A3 (restaurants and cafés), Class A4 (Public houses, wine bars and other drinking establishments), Class A5 (Hot food take aways), and Class D2 (including cinemas, bingo halls, swimming baths and gymnasiums). It should be noted at the outset that this assessment does not cover residential and Class B1 employment uses, although account is taken of the existing evidence available for these uses.

[2] 2012-based Sub-National Population Projections released in May 2014

the development of positive plan-led visions and strategies to help ensure the vitality and viability of town centres first, and retains the key sequential and 'impact tests'.

1.8 The study also draws on other evidence and research prepared for the Council; including *Guildford's Town Centre Vitality and Viability Report* **2011 and 2013 (Draft), which presents data on the town, district and local centres in the Borough. The study also uses the Council's survey data on town centre uses (2011 and 2013) for key centres (and Ladymead Retail Park) to inform the** *Town Centre Vitality and Viability Reports***. Survey data for 2014 is used for district and local centre audits.**

1.9 The assessment of the need for new (convenience and comparison goods) retail floorspace has been carried out at the strategic Borough-wide level. The study area covers a broad geographical area, which includes Guildford Borough and extends into neighbouring Local Authorities. This study area has been further divided into smaller zones that broadly reflect the influence and prime catchments of the Borough's main centres. This report applies the study area and zones defined for the 2011 GRLSU Study as the baseline for the study area definition (see Appendix 1). This will enable comparisons of changes in shopping patterns (market shares) over time, as well as helping to identify the impact of new shopping and other town centre uses on market shares both within and outside the Borough.

1.10 The defined study area and zones also provide the framework for the new telephone interview survey of some 1,000 households conducted by NEMS Market Research in July 2014. This survey provides the most up-to-date evidence on shopping patterns, leisure preferences and expenditure flows within the Borough and wider study area. In turn, this has informed the centre health check updates, as well as the quantitative need (capacity) and qualitative need assessments for new retail, leisure and other town centre uses.

1.11 It is important to state at the outset that, in our experience, capacity forecasts beyond five years should be interpreted with caution. This is supported by the National Planning Practice Guidance (NPPG) which refers to a need to accommodate development over a "three to five year period" (Reference ID: 2b-003-20140306). We therefore advise the Council that although this updated study does provide the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications, the forecasts should be monitored and updated to take into account any significant changes in retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail sector (such as, for example, the growth in internet shopping).

REPORT STRUCTURE

1.12 For ease of reference, the report is structured as follows:

- Section 2 reviews the national, regional and local planning policy context material to retail, commercial leisure and town centre matters. This provides the framework for this study.
- Section 3 highlights some of the key trends that are driving the dynamic changes in the retail sector and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
- Section 4 establishes the study area used to inform the household survey and sets out the findings of market share analysis drawn from the household survey, as well as details the key competing centres.
- Section 5 sets out the findings of the health check assessment for Guildford Town Centre, which is based on a range of Key Performance Indicators used to identify the town centre vitality and viability.
- Section 6 sets out the findings of the health check assessments for the Borough's two District Centres as well as a review of the Borough's Local Centres and out-of-centre retail provision.
- Section 7 describes the key inputs of the economic (capacity) assessment for comparison and convenience goods retailing and sets out the forecast residual expenditure and capacity forecasts for the Borough up to 2033 (the development plan period). It also provides advice on the appropriate scale, location and phasing of any new retail floorspace.
- Section 8 sets out the findings of the Borough-wide leisure needs ('gap') assessment, and looks at potential opportunities to improve the leisure provision in over time.
- Finally, Section 9 draws together the key findings of the retail and commercial leisure needs assessments and sets out the overall conclusions and recommendations.

2.0 PLANNING POLICY CONTEXT

2.1 This section briefly reviews the national and local development plan planning policy context material to both plan-making and development management at the local level.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must therefore be taken into account in the preparation of Local Plans[3] and Neighbourhood Plans[4].

2.3 At the heart of the NPPF is a presumption in favour of sustainable development[5], which is seen as *"a golden thread running through both plan-making and decision-taking"* **(paragraph 14). The NPPF (paragraph 14) sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local level. For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits; either when assessed against the policies in the NPPF taken as a whole, or where specific policies indicate development should be restricted. The Framework states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that:**

> *"…All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally" (paragraph 15).*

2.4 The NPPF (paragraph 17) also sets out 12 core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should, *inter alia*, **be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.**

2.5 The Framework (paragraph 150) emphasises that Local Plans are *"…the key to delivering sustainable development that reflects the vision and aspirations of local*

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[3] Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

[4] A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

[5] Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

communities". They should be *"aspirational but realistic"* and should set out the opportunities for development and clear policies on *"…what will or will not be permitted and where"* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional DPDs should only be used where clearly justified (paragraph 153).

2.6 The NPPF (paragraph 156) requires strategic priorities for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements:

- plan positively for the development and infrastructure required in the area;
- be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date;
- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and
- identify land where development would be inappropriate, for instance because of its environmental or historic significance.

2.7 In terms of the evidence-based approach to planning, the Framework states LPAs should ensure that the Local Plan is based on *"…adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area"* (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to assess the needs for land or floorspace for economic development, including for retail and leisure development; examine the role and function of town centres and the relationship between them; assess the capacity of existing centres to accommodate new town centre development; and identify locations of deprivation which may benefit from planned remedial action.

2.8 The NPPF is clear that pursuing sustainable development requires *"…careful attention to viability and costs in plan-making and decision-taking"* (paragraph 173). Plans should be deliverable and, in this context, sites and the scale of development identified in the plan should *"…not be subject to such a scale of obligations and policy burdens that their ability to be delivered viably is threatened"* (paragraph 173).

2.9 The Framework (paragraphs 18-149) sets out 13 key 'principles' for delivering sustainable development, including building a strong, competitive economy;

ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment. In terms of ensuring the vitality of town centres the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre[6] environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should:

- **recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;**
- **define a network and hierarchy of centres that is resilient to anticipated future economic changes;**
- **define the extent of town centres and primary shopping areas7, based on a clear definition of primary and secondary frontages8 in designated centres, and set policies that make clear which uses will be permitted in such locations;**
- **promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;**
- **retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;**
- **allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;**
- **ensure that the needs for retail, leisure, office and other main town centre uses are** *"met in full"* **and** *"not compromised by limited site availability"*. **Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;**
- **allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;**

[6] The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

[7] Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

[8] The NPPF (Annex 2) states that 'primary frontages' are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. 'Secondary frontages' provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.10 When assessing and determining applications for main town centre uses[9] that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a sequential test[10], which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequential sites are not available. When considering edge and out of centre proposals, *"…preference should be given to accessible sites that are well connected to the town centre"* (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.
- Require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m^2). The NPPF (paragraph 26) states that this should *"include"* assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, *"…the impact should also be assessed up to ten years from the time the application is made"*.

2.11 The NPPF (paragraph 27) states that *"…where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused"*.

2.12 As previously stated in Section 1, this study also draws on advice set out in the *National Planning Practice Guidance* (NPPG), published in March 2014. The NPPG has streamlined and replaced the advice previously set out in PPS4 *Practice Guidance on Need, Impact and the Sequential Approach* (the 'Practice Guidance'). The guidance

[9] NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

[10] This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

still places significant weight on the development of positive plan-led visions and strategies for town centres, and has retained the key sequential and 'impact tests'. Of relevance to this study the NPPG does state that the assessment of the potential for centres to accommodate new development and different types of development should cover a "*three-five year period*" but should "*also take the lifetime of the Local Plan into account and be regularly reviewed*".).

THE DEVELOPMENT PLAN

2.13 The current Local Plan for Guildford was adopted in 2003 and is in the process of being replaced. The Council have completed two regulation 18 consultations on the Issues and Options document in October and November 2013. The Draft Local Plan Strategy and Sites was recently subject to consultation following a 12-week period from the 1st July 2014.

2.14 The Development Plans that are therefore material to this assessment are:

- Local Plan 'saved' policies (adopted 2003);
- The Proposals map (2003); and
- The Draft Local Plan Strategy and Sites (July 2014).

2.15 The following provides a brief summary of the main provisions and policies of these development plans pertaining to the vitality and viability of town centres, and planning for new retail, leisure and town centre uses.

The Local Plan Saved Policies (2003)

2.16 The current Local Plan for Guildford was adopted in 2003. Most of the policies from this Local Plan have been saved in order to provide a guide for development control until a new Local Plan is adopted, following the provisions set out in the Planning and Compulsory Purchase Act 2004. Once the new Local Plan is adopted it will supersede the relevant saved policies from the 2003 Local Plan. The following 'saved' policies are currently applicable to new retail and leisure development proposals.

2.17 Policy S2 relates to additional retail development in Guildford town centre. This policy sets out the Council's objective to only grant planning permission for retail development of over 2,500m^2 (gross) in the town centre where these can be shown not to risk impacting on the vitality and viability of the centre.

2.18 Policies GT1 and GT8 identify eight 'Proposals Sites' for potential development that should be implemented over the Plan period (up to 2006). Of these sites, three have yet to be developed. Site GT1, land at Bedford Road opposite the Odeon Cinema and Site GT8, land and buildings at Guildford Railway Station. All three sites were allocated for mixed use development including retail.

2.19 Other relevant saved policies include:

- Policy S3 on the provision of small retail units (class A1) states that allowances should be made for the retention or development of small units within major retail developments.
- Policy S4 restricts totally the change of use from shops to other uses in the Primary Shopping Area. Policies S5 to S7 together present restrictions on such changes of use from retail in order to regulate Secondary, Tertiary, and Specialist Shopping Areas (as identified in the Proposals Map);
- Policy S8 identifies Station Parade in East Horsley and Wharf Road in Ash as the borough's two District Shopping Centres. These centres perform a vital role locally and appropriate development in these centres will be encouraged.
- Policy S9 identifies 22 Local Shopping Centres in the borough. Appropriate development in these centres will be encouraged.
- Policy S10 refers to individual shops within neighbourhoods and states that individual small scale retail developments may be permitted where appropriate and where the needs of the local community are being met.

The Draft Local Plan (2014)

2.20 The emerging Local Plan will consist of two parts; the first dealing with *Strategy and Sites* and the second with *Delivering Management*. The first part has been produced in draft form and is currently going through a period of consultation, after which a submission draft will be produced for consultation, followed by Examination in Public (EiP). The second part of the draft Local Plan will provide policies that relate to development management. A Regulation 18 consultation was held in October and November 2013 on issues and options for future development, and a second Regulation 18 consultation was held between July and September 2014 on a draft Local Plan. Once the two constituent elements of the draft Local Plan have been adopted, this will supersede some of the saved 2003 policies.

2.21 The draft Local Plan Strategy and Sites document sets out the borough wide spatial strategy for development over the plan period up (to 2033). The scale and location of development will be informed by the identified need for homes and employment land.

2.22 Policy 2 of the draft Plan sets out the retail hierarchy for the Borough, as follows:

- Guildford town centre as the main centre for the Borough, meeting the needs of a wide catchment area and serving as a focus for the Borough in the provision of retail and leisure uses;
- East Horsley and Ash as the two district centres, that serve a more localised catchment area but offer a range of convenience and comparison retail in addition to service uses and community facilities (around 30 units each); and
- Twenty-five local centres, of which 13 are in the Guildford urban area, ranging from smaller centres serving local day-to-day requirements to larger centres

having a broad range of commercial and community facilities, but serving local needs.

2.23 The draft Plan sets out the scale and location of retail development in the Borough over the next 15 years, which is based on forecast need identified in the 2011 GRLSU. The majority of retail floorspace (50,000m^2 gross) is planned for Guildford town centre. Around 2,000m^2 (gross) of new retail floorspace is also planned to support the urban extensions to Guildford (Gosden Hill Farm, Blackwell Farm, Liddington Hall, Land north of Keens Lane), which will together create over 5,000 new homes. The retail hierarchy has split local shopping centres into 14 urban and 8 rural, and has identified locations for three new local shopping centres. Against this background, SP's update of the 2011 GRLSU will review the convenience and comparison goods retail capacity forecasts for the Borough and its key centres; as well as advising on the capacity for new retail uses as part of the planned strategic housing areas contained within the draft Local Plan.

2.24 The Local Plan will be accompanied by a *Policies Map*, which will replace the current 2003 Proposal Map and will geographically illustrate the land use designations, policies and site proposals/allocations of DPDs.

2.25 Key sites identified for retail and leisure development in Guildford town centre set out in the draft Plan include:

- The North Street regeneration site, which will include new A1, A3 and D2 (retail, food and leisure) uses. More information is provided in the section below;
- Portsmouth Road car park site, which would include new B1a office, hotel (C1) and leisure (A3/D2) uses;
- Land at Guildford Railway Station would include a new hotel (C1), office (B1a), retail (A1), leisure (A3/D2) uses and up to 450 new homes;
- Land at Bedford Road would include offices (B1a), housing and restaurant/ café (A3) uses;
- The Debenhams site would include housing or retail (A1) and leisure (A3/D1) uses; and
- Dolphin House, housing (C3), retail (A1) and leisure (A3/D1) uses.

2.26 Outside of Guildford town centre, there is a new local centre planned as part of the development of 2,250 new homes at Blackwell Farm. Sites identified for retail and leisure uses will be considered as part of this study in Section 7.

Guildford Town Centre Vision

2.27 The Council's *Interim Town Centre Framework* document is helping to inform the emerging Local Plan document regarding development proposals for the town centre and for North Street. North Street is the primary development site located within the draft Local Plan 2014's Town Centre Vision's core retail area. In March 2014, the Council commissioned Allies Morrison Urban Practitioners (AMUP) to produce a vision for the town centre which will build on this work and will form a framework for development over the plan period.

2.28 The emerging proposal relevant to this study include:

- Proposal #6. Redeveloped cinema block including a remodelled cinema and riverside apartments.
- Proposal #13. New mixed-use development blocks. These include shop units, restaurants and cafes facing onto streets and lanes with residential development at upper levels accessed from shared rooftop courtyards.
- Proposal #17. New cultural building.
- Proposal #21. New riverside development including retail, restaurants and apartments.
- Proposal #24. Potential for the partial redevelopment of the existing Debenhams site to introduce new riverside apartments and improve access to the river frontage.

2.29 Detailed proposals are not yet available, but the plan aims to implement a total of 24 recommendations that together would enhance and develop the offer and attractiveness in Guildford Town Centre.

SUMMARY

2.30 This section has provided an overview of the national and local planning policy context material to plan-making and the determination of new retail and town centre uses.

2.31 The underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, and to promote new development in town centre locations *"first"* in accordance with the sequential approach. This is crucial as town centres face increasing economic challenges associated with alternative forms of retailing; in particular online shopping and competition from major out-of-centre developments (discussed further in Section 3). It also remains to be seen how recent and proposed changes to permitted development right legislation will impact on town centres, including Guildford.

3.0 RETAIL, TOWN CENTRE & LEISURE FUTURES

3.1 Britain's urban and retail landscape has altered dramatically since the 1980s. The changes in the location of new retail and leisure development, and the dynamic shifts in the nation's shopping and leisure habits, have largely been shaped by the complex interaction of policy, economic, social, consumer lifestyle and investment trends. In turn, these trends have had a significant impact on the current and future role of centres, which need to be taken into account when forecasting needs, identifying sites and strategies, and assessing the impact of new development.

3.2 This section summarises some but by no means all of the key trends that have driven change in the retail and leisure sectors over the last three decades, the impact of these on town centres, and suggests how these trends may continue to shape change in the future.

RETAIL TRENDS

3.3 The key trends affecting the retail sector at present include the impact of the recent recession on consumer spending and retail development, and the rise of Internet shopping. These trends have had implications for the format and make-up of the retail sector. Town centres, once the principle focus for retail and leisure are now increasingly under threat, giving rise to some important research which highlights a number of strategies for safeguarding the viability and vitality of town centres going forward. These trends are set out in more detail in the following sections.

Retail Expenditure

3.4 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This has effectively reduced disposable income and retailers' margins are being squeezed further.

Table 3.1 Growth in UK Retail Spend per Head (% change), 2009 - 2033

Volume Growth per head (%):	ACTUAL GROWTH-------------------------:					FORECAST GROWTH-----------:				
	2009	2010	2011	2012	2013	2014	2015	2016	2017-2022	2022-2033
Total Retail Spend	-3.1	0.3	-0.8	1.2	2.3	3.3	3.0	2.1	2.2	2.6
Convenience Goods:	-5.0	-0.8	-2.7	-0.5	-1.3	-0.5	0.5	0.4	0.6	0.6
Comparison Goods:	2.4	0.9	0.5	2.6	4.6	5.6	4.4	3.1	3.1	3.3

Source: Experian Retail Planner Briefing Note 12.1 (October 2014) Figures 1a and 1b.

3.5 As the table shows, there has been limited growth in retail (convenience and comparison goods) expenditure per head since 2008. Experian Business Strategies (EBS) forecast average comparison goods retail spending growth of +2.2% to 2.6 per annum for the period 2016-2033, which is lower than growth rates based on past trends of around +3.2% (the average annual growth for the period 1983-2013).

3.6 Notwithstanding this, there have been positive signs of improvement in the economy during 2013 and 2014. For example, the latest figures from GFK's Consumer Confidence Index (May 2014) show that consumer confidence has reached its highest level since mid-2007 following a rapid increase over the past 12 months. Despite this, the retail sector remains fragile and analysts forecast that some operators and centres will continue to struggle over the short to medium term.

Retail Development

3.7 The retail development pipeline slowed dramatically during the economic downturn compared with the shopping centre *"boom"* experienced in the ten year period up to 2007. One of the key impacts has been to *"weed out"* some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.

3.8 The latest *'Shopping Centre Development Pipeline'* Research Report by the British Council of Shopping Centres (BCSC) in 2013 confirms that the quantum of completed new shopping centre floorspace in the UK is currently at its lowest level since the 1990s. Following the development of circa 260,000m^2 (gross) in 2009, 232,000m^2 in 2010 and 280,000m^2 in 2011, no new floorspace opened in 2012. The quantum of retail development in the pipeline is also continuing to decline, with shopping centre proposal levels falling by 37% from a peak of 30 million m^2 in March 2009 to 19 million m^2 in June 2013 (CBRE data[11]). This trend is anticipated to continue over the short term at least to 2015/16.

3.9 Notwithstanding this, BCSC research has also indicated the first significant signs of new activity, with circa 140,000m^2 of new floorspace opening in 2013 (including Trinity Leeds). Development in central London has remained strong, accounting for around 40% of all shopping centre construction activity in 2013[12]. There are also a number of major schemes scheduled for 2014 and 2015; the most significant are Grand Central in Birmingham and Old Market in Hereford.

3.10 Given that it takes on average over ten years for a town centre scheme to be planned and developed, and can take even longer to deliver more complicated sites, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Furthermore, the more challenging retail environment means that those (mainly non-prime) shopping locations that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, or alternately they may require a new approach to regeneration if they are to secure new investment and development. Even then, the scale and type of new retail investment that will emerge in the post-recessionary period could be very different to the last "*golden decade*" of shopping centre development between 1997 and 2007.

[11] CBRE (June 2013) UK Shopping Centres in the Pipeline
[12] Ibid

Internet Shopping

3.11 New forms of retailing have also emerged in recent years and are becoming established as significant alternatives to more traditional 'bricks and mortar' shopping facilities. Over the last 5 years, online sales have increased by 222%[13].

3.12 Internet and multi-channel shopping have increased their market share of retail sales in certain product categories due to the increased use of personal computers, mobile phones and faster Broadband access. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products on the high street (the most recent examples being HMV and Blockbusters).

3.13 The growth of online sales of clothing has hit retail both in and outside of town centres, and is predicted to account for 15.7% in 2014[14], the strongest of any online sector. A recent example of this is the announcement in June 2014 by H&M, Europe's second biggest fashion retailer, to launch websites in up to 10 of its markets in 2015. This follows increased profits of around 25% in early 2014, attributed in part to the success of the retailer's new online stores.

3.14 Although forecasters are still uncertain as to the future growth of internet shopping, there does appear to be significant potential for increased market share over time. For example, the latest forecasts by Experian in *Retail Planner Briefing Note 12.1* (October 2014) indicate a growth in the market share of total non-store retail sales from 13% in 2014 to 20.1% by 2033.

3.15 However such forecasts need to be treated with caution, as Experian forecast that approximately 25% of all Special Forms of Trading (SFT) sales for comparison goods and some 70% for convenience goods occur through traditional ("*bricks-and-mortar*") retail space. In other words, the majority of convenience purchases that are currently made online via computers, smart phones, tablets, etc., are sourced from existing stores on the high street or out-of-centre superstores.

3.16 Over time it is likely that the main foodstore operators will increase the number of (Class B8) distribution warehouses to directly source online food and non-food shopping (for example, Tesco has recently opened a modern 'dotcom' warehouse in Erith). At this early stage in development it is our judgement that the main impact of the growth in 'dotcom' warehouses will be *'like-for-like'* on Internet sales currently sourced from existing stores. Therefore, the growth in dotcom warehouses is unlikely to have a significant impact on current main food shopping patterns and result in any marked increase in store closures. In turn this will help to 'free up space' in existing stores for different uses and activities. Furthermore, current research suggests that there will still be demand from operators to increase ('physical') store floorspace to

[13] The Grimsey Review (2013): An Alternative Future for the High Street
[14] Verdict Retail Review, March 2014

cater for rising internet sales. In particular the forecast growth in 'click-and-collect' as a key driver of current and future internet growth will mean that retailers will still be looking for a physical presence in easily accessible locations, particularly centred around transport hubs.

3.17 The growth of internet shopping is also giving rise to the trend of 'showrooming' where customers view and test products in store, but complete purchases from online retailers; often via smart phones while in-store. With online shopping and price comparison 'apps' becoming more popular, this increases competition with '*bricks and mortar*' stores. In response, many retailers are building 'showrooms' into their retail model by price matching online competitors. For example, the development of Silvertown Quays in Newham will see the first development of '*brand pavilions'* where major comparison retailers can target online customers by showcasing products for online sales. There could therefore be opportunities in Guildford for 'showrooms' and 'click-and-collect' facilities in shops as well as the potential for 'pop-up' shops to temporarily occupy vacant units, including to showcase online retailing.

'Productivity' Growth of Existing Retail Floorspace

3.18 For all retail floorspace we have assumed an annual average 'productivity' or 'efficiency' growth rate for the forecast period (2014-2033) of between -1.4% to 0.1% for convenience goods floorspace and between 2% and 3.8% for comparison goods floorspace over the forecast period[15] (shown in Figure 3.2). These growth rates have been informed by Experian's latest Briefing Note Addendum[16] and other research and exclude productivity growth associated with online sales.

3.19 In recent years, the productivity growth of existing retail floorspace has varied in response to market conditions. For example, there has been a reverse trend in productivity for convenience retail floorspace with floorspace efficiency forecast at negative growth. This reflects a variety of factors, most notably reduced convenience expenditure and changing shopper habits with customers shunning weekly bulky food purchases at large foodstores to more frequent convenience/ top-up shopping trips. In response, major grocery retailers are seeking to cut capital costs by downsizing from major stores and focusing growth on convenience format stores. As a result Experian forecast limited productivity of growth of existing convenience floorspace over the plan period.

3.20 In contrast, Experian forecast a spike in the productivity of existing comparison floorspace for 2014 (5.3%), which takes account of pent-up consumer and investor demand; generated from renewed consumer confidence from a recovering economy. With a shortage of new retail floorspace on the market, retailers are increasing the efficiency of existing floorspace to maximise sales. This is particularly the case for

[15] However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

[16] Retail Planner Briefing Note 12.1 Addendum, October 2014, Experian Business Strategies

retailers who are using existing stores to source online sales stock and facilitate multi-channel functions such as click and collect. By 2016 productivity slows to 2.3% and over the longer term annual growth stabilises at around 2% (2017 to 2021) to 2.2% (2022 to 3035). This reflects a forecast slowdown in comparison expenditure growth and an expected growth in new comparison floorspace.

Table 3.2 Forecast Productivity Growth of Retail Floorspace

	2013	2014	2015	2016	2017-2021	2022-2033
Total Retail	1.8	2.9	2.2	1.3	1.2	1.5
Convenience Good	-1.8	-1.4	-0.3	-0.4	-0.2	0.1
Comparison Goods	4.3	5.3	3.8	2.3	2.0	2.2

Source: Retail Planner Briefing Note 12.1 Addendum (October 2014), Experian Business Strategies

Implications for Retail

3.21 The economic downturn, in combination with other trends such as changes in customer requirements, planning legislation and the growth in internet shopping has created a need for retailers have to adapt their business strategies and store formats. In general terms those retailers with strong brands and loyal customers, trading from the right stores in the right locations, and with a good online facility have managed to weather the economic storm.

Convenience Goods Retailing

3.22 In particular, the changes in the grocery sector over the last decade illustrate the dynamic changes in the retail sector. Some of the key trends include:

- The move by all the major national grocery retailers into the smaller convenience store sector in order to increase market share further. For example, Tesco now has over 1,500 'Express' format stores, Sainsbury's has developed its 'Local' format nationally, Morrisons its 'Local' stores and Waitrose are testing the 'Little Waitrose' format within the M25. Asda's purchase of a number of former Netto stores has also allowed it to operate from smaller convenience store formats. In addition, Aldi and Lidl have both announced plans to enter the convenience retail market with convenience format style outlets.
- The growth of European 'deep discount' food operators (such as Aldi and Lidl) has also continued during the economic downturn. In response to this competition, the established grocery retailers have expanded their own-range 'value' products and promoted significant 'price discount' campaigns. In the

UK, sales from discounter stores Aldi and Lidl are forecast to double over the next five years to 2019, taking market share in part from the hypermarkets/ superstores, where sales are predicted to fall despite increased levels of spending. A recent announcement revealed that Sainsbury's will be entering into a number of joint venture projects with Danish discount grocer Netto, including the opening of some 15 Netto stores by the end of 2015. This will see Netto re-enter the market having sold its stores in previous years (e.g. as highlighted before).

- Marks and Spencer are driving forward growth in their M&S Simply Food outlets in response to a decline in the performance of their general merchandise (GM) stores. This has resulted in the closure of many GM stores and the company's focus on edge and out of centre sites for M&S Simply Food outlets. We are aware that the company's requirements for new foodstores include the need for adjoining customer car parking.
- An increase in the non-food sale areas of larger superstores over the last decade, including the development of own-label clothing. In some of the stores operated by Tesco (i.e. the 'Extra' format) and Asda, for example, a significant proportion of sales area (over 50%) is often set aside for non-food retailing. More recently, Lidl has started to offer a discounted clothing range in some of its larger stores.
- The 'race for more space' and new store openings over the last decade has also resulted in extensions to existing stores and/or new mezzanine space, and the growth of online shopping.

3.23 However, the economic downturn has resulted in some of the main food operators reviewing and revising their established business models over the last 12-18 months. There are signs that those operators that have largely driven new store openings and expansion over the last 20 years (principally Tesco and Sainsbury's) are now focussing on increasing market share and profitability through the growth of smaller convenience store formats and online sales. As a result there has been a marked slowdown in applications for major new food superstores compared with previous levels during the 1990s and the period up to 2010.

Comparison Goods Retailing

3.24 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high end and value retailing, have largely struggled to maintain market share over recent years. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have gone into administration and been forced to reduce their representation in centres across the UK (e.g. HMV, Blockbusters, etc.).

3.25 The 'bulky goods' retail warehouse sector has not been immune to the impact of the economic downturn. It has experienced a period of significant change and, more recently, instability. For example, during the late 1990s both B&Q ('Warehouse') and Homebase were rolling out very large out-of-centre retail warehouses (some exceeding 10,000m^2 gross) in an attempt to dominate market share. However, these same operators are now looking to close or scale down their under-performing stores in certain areas. Most recently, Homebase announced their intention to close one in four stores, which highlights how the DIY retail market is under strain. Other 'bulky goods' operators have failed to remain viable in the economic climate (for example, Focus DIY). As a result there is increasing demand to relax bulky goods conditions on former DIY stores to allow more general comparison retail uses. Given that the majority of these larger format bulky goods stores are located out-of-centre, any relaxation of conditions could have implications for town centre vitality and viability.

COMMERCIAL LEISURE TRENDS

3.26 Leisure uses make an increasingly important contribution to the vitality and viability of town centres and shopping centres, as they provide complementary uses that contribute to both the daytime, early evening and night-time economies.

3.27 Since the early 1990s the commercial leisure sector has experienced significant growth fuelled by buoyant market conditions, growing levels of disposable incomes and low unemployment. During the 1990s this growth mainly occurred in edge and out-of-centre leisure and retail parks, and was usually characterised by large multiplex cinemas and a range of other facilities (including tenpin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants and budget hotels). However, the tightening of planning policy has resulted in leisure facilities being integrated more into town centre mixed use developments.

3.28 Although the commercial leisure sector has not been immune from the impact of the economic downturn, the latest development trends indicate a move towards leisure-led schemes with multiplex cinemas as important anchors in their own right, along with related catering uses. This is illustrated by the Trinity Leeds scheme where the amount of space allocated to leisure, eating and drinking increased over time to almost one-quarter of the centre's total floorspace. Other leisure-led schemes include the proposed extensions/refurbishments of Centrale in Croydon and Silverburn in Glasgow by Hammerson, which comprise a new cinema and restaurants. The extension to The Walnuts in Orpington also includes a mix of cinema, restaurants and retail, as do the proposals for new leisure-led schemes in Ealing and Hounslow town centres.

3.29 Other sub-sectors of the commercial leisure industry have performed relatively well over the last decade and have expanded rapidly across different locations. For example, the private health and fitness market has benefited recently from the emergence of new 'budget' operators. This new breed of clubs appeal to a wider market with reduced monthly subscriptions. Examples include The Gym Group, Anytime Fitness and EasyGym, which offer "no-frills" venues and "pay-as-you-go" (often 24-hour) entry.

3.30 Section 8 provides a more detailed commentary on current trends in the commercial leisure sector as part of the assessment of leisure needs for the Borough.

TOWN CENTRE TRENDS

3.31 Within town centres, some high street multiple operators are also changing their formats and requirements. Some traditional high street retailers (e.g. Boots, Next, Mothercare, TK Maxx and Marks & Spencer) are also actively looking for space in larger out-of-centre stores, either to accommodate new retail formats or to provide the larger floorplates they need to display their full range of products. These changes in retail development and market demand are clearly impacting on the UK's town centres and high streets.

3.32 Research also shows that there is an increasing polarisation of development activity and investment interest in the larger regional and sub-regional centres (i.e. the *'top 100'* centres). This is because they have larger and established catchment areas and represent less *'risky'* investments in the current uncertain economic climate. These larger centres have also generally benefitted from new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping and out-of-centre locations, with strong catchment areas and a good supply of appropriate retail space.

3.33 In this context the latest 2013-14 Javelin VenueScore[17] ranks Guildford Town Centre within the UK's top 50 shopping locations at 33. By contrast, Kingston-Upon-Thames is ranked 17th. Since 2007, Guildford Town Centre has fallen 20 places in the VenueScore ranking. This fall is most likely explained by the lack of recent investment in the town centre, the loss of certain retailers from the high street due to the impact of the economic downturn and strengthening of retail in other larger centres (e.g. Westfield White City and Stratford) in the last seven years.

Out-of-Centre Development

3.34 Most commonly, it is town centres that have been hit hardest by the decline in consumer spending and closure of a number of big name multiples. The simultaneous growth in many out-of-centre shopping areas has also been identified as a factor

[17] The Javelin VenueScore is widely used as a key indicator to help inform the assessment of the changing attraction and performance of different shopping locations from year-to-year. VenueScore ranks the UK's town centres using a range of key performance indicators and includes a weighted allowance for the type of retail operators in any centre, reflecting their impact on shopping patterns.

contributing to town centre decline. These out-of-town centres can compete by providing retailers with larger, more flexible, newly built floorplates and provide customers with enhanced levels of accessibility and increased car parking provision.

3.35 Planning policy to restrict out-of-town shopping and protect centres has been broadly unsuccessful. An opinion piece by Mary Portas[18], two years on from the Portas Review, has highlighted this ongoing challenge from out-of-centre retailing on town centres. For example data for 2013 shows that, of the new retail developments approved since the NPPF came into force, 72% were out of town, 16% were edge of centre and just 12% were in town centres[19].

Town Centre Revitalisation Strategies

3.36 Recent trends show that the paradigm for successful retail centres is changing, and that providing more retail floorspace is now just one element of a wider strategy for retailers looking to expand their market share. There has been considerable debate in recent years regarding strategies that may protect the viability of small and medium town centres in the face of multiple trends which have led to a downsizing and even loss of some big name retailers and an increasing focus by these larger retailers on prime centres and out-of-town centres at the cost of smaller centres.

3.37 A number of important pieces of research have been commissioned that set out recommendations and guidance on maintaining and enhancing the vitality of town centres. The most prominent of these include the following reports:

- The Portas Review (2011) reports on the findings and recommendations of research led by Mary Portas into the future of the High Streets. The report presented 28 key recommendations for government, local authorities and businesses to help high streets to respond to the current challenges facing them and to prevent further decline.
- The Grimsey Review (2013) addresses the continuing decline of many local high streets despite the various implementations aimed at preventing this enacted on the back of the Portas Review. The Review highlights the dramatic impact that recent technological changes have had on consumer behaviour and the knock-on effects for high streets and suggests that the Portas recommendations failed to adequately account for this.
- The Distressed Town Centre Property Taskforce (DTCP) report (Nov 2013) was produced by an industry-led cross sector taskforce, put together in response to the Portas Review. The focus is on the role that property ownership, investment, development and occupation can have on town centre viability and provides recommendations on how the property sector can act to leverage in investment for town centres and support their ongoing viability.

[18] The future of high streets: progress since the Portas Review, July 2013, DCLG
[19] http://www.acs.org.uk/en/research/planning.cfm referenced in Why Our High Streets Still Matter: A Think Piece by Mary Portas, 30th May 2014.

3.38 3 sets out an overview of the strategies recommended to support town centre revitalisation in these three reports and in related research. Many of these recommendations have since been implemented to varying degrees by the Government, particularly those of the Portas Review.

Table 3.3 Town Centre Revitalisation Strategies

Strategy	Description
Reforming the management of town centres	Improving the ways in which town centres are managed was a key recommendation made by the Portas Review. In response, the Government has set up 27 'Portas Pilots' and 333 Town Teams, which bring together local councils, retailers and businesses to try out new ideas to drive their local economy. Strategies to deliver change are formulated in recognition of the particular strengths of each local area. It may be too early in the process to comment on the success of these, however a recent thought piece published by Portas (May 2014) has suggested that progress has been slow. There is also increasing financial support for Business Improvement Districts (BIDs), which enable local businesses to take on responsibility for realising improvements in their local area. The Government has launched a BID Loan Fund to help those wishing to set up a BID in their area. Support for local (street) markets is also increasing, as a way to increase footfall and enhance the vibrancy of local centres. This was also a key recommendation in the Portas Review.
Making use of the planning system to protect and enhance town centres	The planning system is being used in various ways to enhance and protect local centres where possible. This includes maintaining use of 'town centres first' policies (as set out in the NPPF) in order to protect town centres from unnecessary competition from out-of-town developments. Where BIDs are in place, the improved planning conditions may also facilitate development. More stringent protection has been advocated by some sources. The Portas Review included a recommendation to introduce 'exceptional sign off' for all new out-of-centre retail development in order to protect existing centres. However, this was one of the few Portas recommendations that was not taken on by the Government. LPAs are also being encouraged to make use of CPOs in order to address issues of fragmented ownership and to facilitate comprehensive development across a centre.
Engaging communities	Encouraging communities to support their local high streets and town centres is essential and was a key recommendation in the Portas Review. Recent strategies to promote community participation in the development of local centres have included government support for communities wishing to take on the responsibility for ownership and management of assets of community value, such as their local pub or shop. A £19 million fund has been set up and more than 300 assets have already been listed under the Community Right to Bid.
Leveraging investment and funding	There are a number of new sources of public sector investment now available to facilitate improvements to local centres. These include £3.6m of funding via the Town Teams, a High Street Innovation Fund worth £10m and High Street renewal awards to date worth £1m. The DTCP suggestion that a workable Tax Increment Finance (TIF) model be put in place has since been actioned by the government. This will allow LPAs to raise finance to fund development and infrastructure based on the projected future increase in business rates resulting from investment. The DTCP report has also recommended greater engagement between LPAs and the private sector in order to tackle the challenges faced by town centres proactively. They support the use of joint venture partnerships between the public and private sector to facilitate development. A recent report by Peter Brett[20] suggested a new method that would involve the selection of a Property Company Partner (possibly private sector) who will then fund future investment in the centre. The Property Company would be assisted by the LPA through use of CPOs and restricting leases to de-fragment the ownership of the high street.
Adapting to take on the threat from increasing internet sales	Recent research has highlighted the importance of recognising the threat from increasing internet retailing as an important trend that will continue over the short term. Some centres are adapting better than others for example, the incorporation of Click & Collect (delivery and returns) points into centres. Other more general strategies include ensuring adequate parking and accessibility to improve the general accessibility of the centre. The Grimsey Review recommends that town centres focus on their role as a community hub, where retail just one element, creating a diverse offer which will help local centres to compete more effectively with online retailers. The DTCP recommends adapting retail capacity models in order to account for the erosion of the physical retail space requirement in the face of competition from online retail. LPAs in many secondary town centres will need to actively plan for this future loss of retail space requirement, particularly from the larger retailers.

[20] Peter Brett (2013): Investing in the High Street: Town Centre Investment Management and its role in delivering change

Strategy	Description
Encouraging a mix of uses	A recent trend has been the growing presence and proportion of food and beverage (F&B) units within shopping centres and high streets. A BCSC report[21] suggests that there are various benefits that may result from this, and recommends that shopping centre development include a mix of retail, F&B and leisure which are generally mutually supportive. However, there are also warnings that this is not the whole solution to filling current vacancies left by retail decline. The BCSC recommends that F&B units in retail centres should be targeted appropriately according to the likely consumer profile. Conversion from shops to residential uses is also becoming one way for LPAs to make better use of underused retail space and prevent unwanted vacancy. Increased residential populations living in or near to the town centre will also improve footfall and potentially spend in these areas. However, with high levels of pressure due to national housing shortages, there is a danger that the influx of residential development into town centres could undermine the retail and leisure functions of the centre.

Town Centre Futures

3.39 Although there are positive signs that the UK is finally beginning to emerge from the economic downturn, it is clear that the commercial property sector post-recession will be very different to the *"boom"* years of the last decade. Over the short to medium term at least the economy is forecast to experience a sustained period of lower growth in consumer spending, reduced bank lending, limited access to credit and cuts in public sector expenditure. This presents significant challenges for all those involved in the town centres development and investment.

3.40 The growth of online shopping is also impacting on the vitality and viability of many of Britain's centres and high streets. This is placing pressures on rental growth and market demand in many centres, particularly secondary centres outside the *'top 100'* shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined, from 64% in 2002 to just over 40% by 2013[22]. In our opinion, a far more uncertain future awaits the next "*wave*" of new retail investment and development. The evidence suggests that high quality schemes in the strongest prime shopping locations will continue to prosper. In contrast, the weaker secondary centres and shopping locations with a more limited offer, smaller catchments and negligible market demand will struggle to attract market interest and investment.

3.41 Notwithstanding the threat of online shopping, industry experts still predict that the demand from major retailers for new space will continue as it remains the primary mechanism for retailers to 'reach' their customers and grow their businesses. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities), as there is limited new retail floorspace in the pipeline. With increased demand and the lack of supply over the short to medium term, research for the British Council of Shopping Centres (BCSC) predicts that this will effectively '*push up'* rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be

[21] BCSC Food and beverage: A solution for shopping centres?
[22] Peter Brett (2013), Investing in the High Street: Town Centre

competing for limited available space. Therefore those centres that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations) and having the right size, format and specification to meet the needs of modern retailers.

3.42 Research by the BCSC has also identified an increased emphasis on asset management, as owners and developers invest in the expansion or refurbishment of existing shopping centres to increase their investment value and turnover. In the current economic climate this investment in existing assets is less risky and financially onerous than new build projects. However, as the supply of suitable units "dry up" in prime locations, so retailers will also look at alternative options for delivering growth, such as through new out-of-centre openings, increasing sales through the internet, and/or expanding internationally.

3.43 Finally, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, it is likely that applications for new and extended shopping facilities in out-of-centre locations will continue in the future. Potentially the next phase of out-of-centre investment and development could be a further reinvention and masterplanning of existing out-of-centre locations as mixed use developments, comprising residential, office and commercial leisure uses in addition to the existing and extended retail offer. The potential opportunities to "reinvent" out-of-centre shopping locations will be greatest initially where they are located close to towns that do not have the physical capacity (i.e. sequential sites) to increase their retail offer.

3.44 In this context, it is clear that the 'top 100' prime centres and shopping locations in Britain, such as Guildford, should continue to flourish once the economy recovers. The greatest challenge will be how to revitalise the fortunes of struggling small and medium sized centres that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

4.0 STUDY AREA AND PATTERNS OF RETAIL AND LEISURE SPENDING

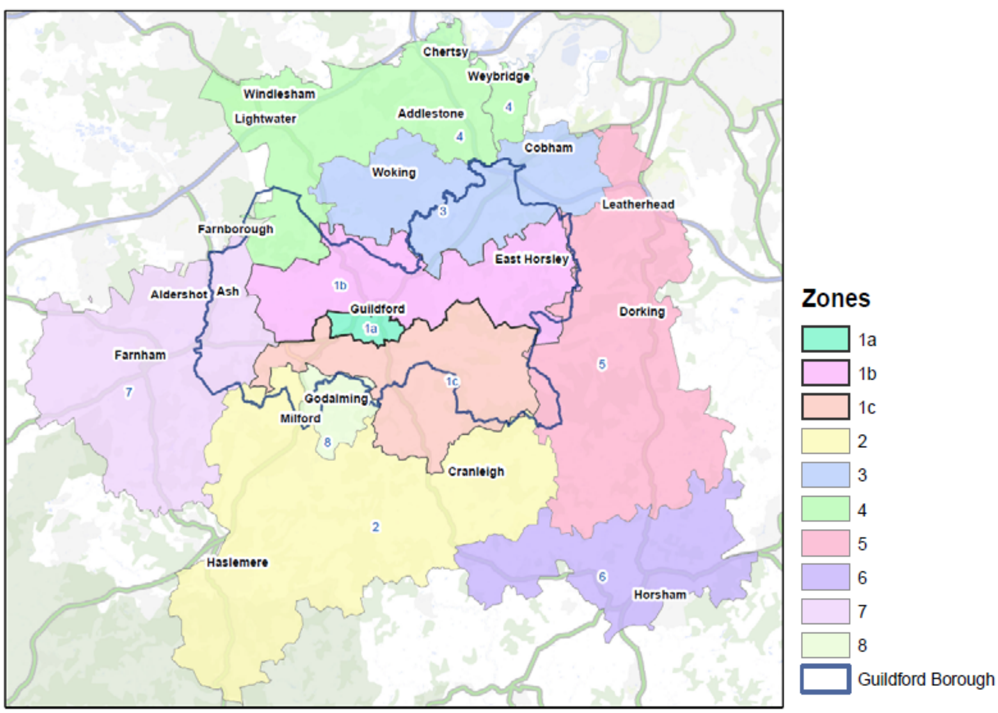
4.1 This section defines the catchment/study area that forms the basis for the updated household telephone interview survey and provides an overview of the study area's customer profile characteristics. Section 4 also identifies shopping patterns across the study area based on the results of the household telephone interview survey conducted in July 2014.

STUDY AREA

4.2 The definition of an appropriate study (catchment) area is an important starting point for any retail and leisure assessment.

4.3 The study area in this case is broadly made up of eight zones (including three sub-zones), which are based on postcode sectors and are set out in Figure 4.1 and Table 4.1. It should be noted that the study area is broadly in line with the study area and zones used in the 2011 GRLSU (and 2006 Retail Study), as this allows for the analysis of changing shopping/leisure patterns and trends over time.

Figure 4-1 Guildford Retail & Leisure Study Area and Zones



Source: Appendix 1; Carter Jonas and Experian MMG3

4.4 The Central Zone around Guildford town centre (which was Zone 1 in the previous study) has been split into three zones to allow for more detailed analysis. As the table below sets out, zones 1a to 1c broadly encompass the borough of Guildford, with the southern zone 1c taking in a proportion of Waverley District. Zone 1a covers the central area of Guildford including the town centre. Zones 1a to 1c combined will provide an indication of retail and leisure patterns for the Borough as a whole.

4.5 Zones 3, 4, 5, 7, and 8 also overlap with Guildford Borough boundary. The majority of Waverley is covered by zones 2, 7 and 8. Zone 5 covers much of Mole Valley Borough, whilst zone 6 covers the majority of Horsham District.

Table 4.1 Study Zones and Postal Sectors

Zone	Postal Sector	Areas of coverage
1a	GU1 3, GU1 4, GU2 4, GU2 7	Guildford centre
1b	GU1 1, GU1 2, GU2 8, GU2 9, GU3 2, GU3 3, GU4 7, KT24 5, KT24 6	Guildford north
1c	GU3 1, GU4 8, GU5 0, GU5 9	Guildford south, Waverly
2	GU6 7, GU6 8, GU8 4, GU8 5, GU8 6, GU27 1, GU27 2, GU27 3	Waverley, Chichester, Guildford
3	KT11 1, KT11 2, KT11 3, GU21 1, GU21 2, GU21 3, GU21 4, GU21 5, GU21 6, GU21 7, GU21 8, GU22 0, GU22 7, GU22 8, GU22 9, GU23 6, GU23 7	Woking, Guildford, Elmbridge
4	KT13 0, KT13 8, KT13 9, KT14 6, KT14 7, KT15 1, KT15 2, KT15 3, KT16 0, KT16 8, KT16 9, GU18 5, GU19 5, GU20 6, GU24 0, GU24 8, GU24 9	Surrey Heath, Runnymede, Guildford, Elmbridge, Woking
5	RH4 1, RH4 2, RH4 3, RH5 4, RH5 5, RH5 6, KT22 0, KT22 7, KT22 8, KT22 9, KT23 3, KT23 4	Mole Valley, Elmbridge
6	RH12 1, RH12 2, RH12 3, RH12 4, RH12 5	Horsham, Waverley
7	GU9 0, GU9 7, GU9 8, GU9 9, GU10 1, GU10 2, GU10 3, GU10 4, GU10 5, GU11 1, GU11 2, GU11 3, GU12 4, GU12 5, GU12 6	Waverley, Guildford, Rushmoor, Hart, East Hampshire
8	GU7 1, GU7 2, GU7 3	Waverley, Guildford

CATCHMENT POPULATION & HOUSEHOLD PROFILE

4.6 The following paragraphs provides a brief snap-shot of the study area's catchment population profile based on the latest ONS-based population estimates for 2014 and household characteristics Experian's Mosaic UK data. A more detailed analysis of current and forecast population and expenditure in the study area is provided in the economic assessment in Section 7.

Baseline Population

4.7 The population of the whole study area in 2014 is 635,162 (based on Office of National Statistics (ONS) estimates[23]). The most populated zones are Zone 4 (which covers Surrey Heath, Runnymede, Guildford, Elmbridge and Woking), and Zone 1 (including zone 1a, 1b and 1c), which covers the majority of Guildford Borough.

4.8 Zone 1 has a total estimated population of 114,837 in 2014, which equates to around 18% of the total study area population. The most densely populated sub-zone in Zone 1 is Zone 1b, which covers the northern part of Guildford and has a population of 72,053. Zones 6 and 8 cover smaller, more rural areas and therefore have the lowest populations.

Mosaic Population Profile

4.9 To help inform the profiling of Guildford's local catchment population we have also drawn on Experian's *Mosaic UK Lifestyle consumer classification*. This provides an deeper insight into the demographic lifestyles and behaviour of all individuals and households in the UK.

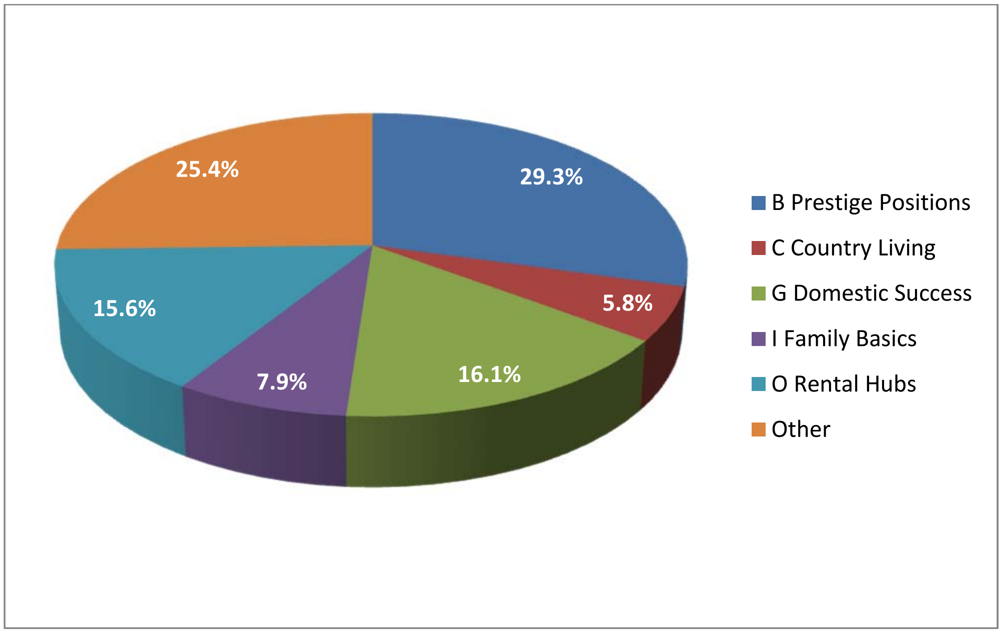
4.10 The Mosaic UK classification is based on a wide range of information and datasets including the Census, Electoral Roll, house sales prices, lifestyle surveys and Experian's own Consumer Classification System. Experian draw on these datasets to classify all individuals, households and postcode areas in the UK into broad lifestyle 'types'. In summary there are 141 Mosaic household types, which are then aggregated into 66 household types that are then aggregated into 15 groups.

4.11 The Mosaic UK consumer classification is typically used by retailers, leisure operators, shopping centre owners and others to better understand customer demographic and lifestyle characteristics. This in turn helps to optimise marketing, site location and business strategies.

4.12 In terms of Guildford's local catchment (Zone 1), the population is broadly spread across five key groups, with the remaining population comprising the remaining 11 Mosaic groups. Figure 4-2 shows that the highest proportion of the population is defined as group B – 'Prestige Positions' (29.3%). Almost a third of the population are defined group G – 'Domestic Success' (16.1%) or group O – 'Rental Hubs' (15.6%). The next highest proportion of the population for Zone 1 is classified as group I – 'Family Basics (7.9%) and group C – 'Country Living' (5.8%). The remaining 25.4% of the population comprises a mix of other socio-economic classifications.

[23] Sourced from Experian using ONS 2012-based interim population projections.

Figure: 4.2 Guildford Mosaic population profile



Source: Experian Mosaic

4.13 The Mosaic groups that are predominant in Guildford are typically those with the highest ranking household incomes and gross financial assets.

4.14 By way of definition, the Mosaic group B *'Prestige Positions'* are characterised as affluent and well educated with successful careers and financial security. They typically live in large family homes and are likely to work in senior and managerial positions or in accomplished professional careers. As consumers, this group is attracted to premium brands and can afford expensive holidays. They are also more likely to use the internet for shopping purchases and other services.

4.15 Group G - 'Domestic Success' are described as high earning families that are headed by couples in their late 30s and 40s. They are more likely to live in upmarket homes in sought after areas and have successful careers in higher managerial and professional roles in finance, property, IT and professional services. This group are frequent internet uses and are more likely to shop and manage bills online.

4.16 Group O *'Rental Hubs'* are characterised as young singe people in their 20s and 30s that live in urban areas. They are more likely to rent their home, are students or are at the start of their careers – typically in administrative and technical roles or aspiring to professional or managerial roles. A smaller proportion wok in lower supervisory jobs or work in the service sector. As a younger group, Rental Hubs are social media savvy and spend a lot of time online.

4.17 These broad categories can also be broken down further to give more detailed information on the population type within an area. Within the Mosaic groups, Experian identifies different sub-categories that make up the broader groups. For Guildford, the population which has been categorised as 'Prestige Positions' primarily comprises the sub-group 'Premium Fortunes, which accounts for the majority (42.1%) of this group. Within the Domestic Success group, the largest proportion for Guildford falls within the sub-group 'Cafes and Catchments' (57.2% of the group). For the Rental Hubs group, the main sub-group for Guildford is 'Career Builders' (45.1% of the group).

4.18 Typical economic and social characteristics of these lifestyle sub-categories are summarised below.

Table 4.2 Dominant Sub-Category Characteristics

Group B - Prestige Position ***Sub Group - Premium Fortunes***	• Influential families • Substantial income • Distinctive and expensive homes • Live in wealthy areas
Group G – Domestic Success ***Sub Group – Cafes and Catchments***	• Affluent families with growing children • Live in upmarket housing in city environs
Group O – Rental Hubs ***Sub Group – Career Builders***	• Motivated singles and couples • 20s and 30s • Progressing in career field • Work from commutable properties

Source: Experian Mosaic

4.19 In summary the Experian Mosaic household classifications for Guildford confirm that it has high ranking households in terms of incomes and gross financial assets. This will clearly have implications for the quality and type of retail, leisure and other services demanded by these more affluent households. Notwithstanding this, half of the households are in other Mosaic classifications and will have different needs.

PATTERNS OF RETAIL AND LEISURE SPENDING

4.20 NEMS Market Research were commissioned to carry out a household telephone interview survey (HTIS) across the defined study area and zones in July 2014. The questionnaire was designed by CJ and (where possible) it asked similar questions to those set out in the previous retail study in order to facilitate comparison. The questionnaire is provided in Appendix 5 along with the survey methodology and full 'weighted' survey results.

4.21 In total, some 1,000 interviews were conducted across the study area's ten zones (i.e. a minimum of 100 surveys per zone in accordance with accepted good practice). NEMS carried out structured interviews by telephone with the person responsible for

the main household shop. A number of measures were put in place by NEMS to ensure each sample was representative of the profile of the person responsible for shopping in the household. Responses across the study area were weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily populated area were not under or over represented in terms of the market share assessment. This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns.

4.22 In addition, we have analysed the results of the survey based on responses from Guildford Borough only by identifying postcodes within the Borough boundary. This is used to highlight any differences between the market shares for Zone 1; specifically relating to Ash District Centre, which is outside the boundary for Zone 1. However, it should be noted that responses identified for the Borough as a whole do not allow for a robust sample size and are treated as indicative.

4.23 The survey results detailing shopping patterns and preferences for different types of convenience and comparison goods shopping are used to inform the market share analysis[24] and turnover estimates for the main study centres, foodstores and retail warehouses at 2014.

Convenience Goods – Market Share Analysis

4.24 Convenience goods[25] retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.). In order to determine and assess current food shopping patterns across the study area, the household survey comprised standard questions on:

- **what store households** *"normally"* **carry out their main 'bulk' (trolley) food purchases (questions 1) and how they normally travel there (question 2);**
- **whether households also regularly visited any other stores for main 'bulk' convenience goods purchases (question 3);**
- **whether they link their shopping trip with any other activities (question 4) and where they go for this (question 5);**
- **where households carry out more frequent 'top up' (basket) purchases (question 6); and**
- **what proportion of their spend on food and household groceries is spend on main food shopping (question 7).**

[24] It is common practice in retail assessments to deduct special forms of trading (i.e. purchases over the internet, mail order shopping and market stalls) from average expenditure per capita figures at the outset according to national forecasts derived from Experian Business Strategies. Internet shopping and special forms of trading have therefore been filtered out from the survey results before undertaking the market share assessment.

[25] For the purpose of this retail assessment 'convenience goods' and 'food' shopping have the same meaning.

4.25 The results for main, secondary and top up shopping are then merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have assumed a standard weighting of 65% for primary main 'bulk' shopping, 10% for secondary main 'bulk' shopping and 25% for top-up shopping. This weighting produces a composite pattern of convenience goods spending and has been applied to identify market shares, expenditure and turnover throughout the remainder of this study.

4.26 It should be noted that for the purpose of the market share analysis, internet sales are identified and then removed from the assessment. This is on the basis that 'special forms of trading' (SFT) is discounted from the retail expenditure analysis, thereby avoiding double counting. A more detailed explanation of SFT is provided in Section 7. For convenience shopping, the household survey shows that only 5.9% of respondents across the Study Area purchase their primary main 'bulk' food shopping online, reducing to 2.2% for respondents from the combined sub-zones for Zone 1. Indicative results for the Borough based on all responses identified from within Guildford[26] (identified by ward) show a higher market share of 6.2%. In comparison, Experian's forecast identifies the national average for convenience SFT at 8.5%[27] in 2014. This confirms a lower than average number of SFT sales for the study area and Borough.

4.27 Looking at in-store sales in more detail, the results of the market share analysis for stores in Borough are set out in Table 1 (Appendix 8). Here the market share analysis shows mixed results in terms of convenience expenditure retention across the eight study zones. Overall, stores in Guildford Borough retain 14.4% of all convenience expenditure (top up and main food shopping) across the study area (i.e. Zones 1 to 8). This represents a reduction from 16.7% identified in the last household survey in 2010.

4.28 Whilst the retention level may appear low, it is taken from a relatively large geographic area (i.e. the study area). Typically, foodstores command a catchment equivalent to a 5 to 10 minute drive-time (depending on the geographic nature of the area) as shoppers are more likely to use stores in proximity to where they live.

4.29 Focusing on the zones that make up Guildford (i.e. Zones 1a, 1b, and 1c that broadly correspond to the Borough boundary), retention levels are varied. For example, convenience expenditure retention is highest in Zone 1a, which largely covers the town centre. In this zone the Borough's food and convenience stores retain 80.5% of all available (Zone 1a) expenditure. The Borough's stores also retain a high proportion of expenditure in Zone 1b at 64.4%. However, expenditure retention falls considerably for Zone 1c (south Guildford) to 29.3%, with 70% of expenditure 'leaking' to

[26] An analysis was undertaken of responses from Guildford Borough for online shopping patterns only. This was achieved by identifying responses by postcodes that fall within the local authority boundary. However, as the sample size from responses based Guilford Borough boundary is random the results should be treated as indicative only.
[27] This all SFT (including online sales) and does not exclude sales serviced from stores.

foodstores outside the Borough; in particular Godalming (Sainsbury's and Waitrose) and a mix of other locations (e.g. Woking, Cranleigh, Farnham).

4.30 Based on the combined results for sub-zones in Zone 1, the Borough's stores retain 61.4% of all food expenditure in Zone 1, which is a reduction from 73.8% reported in the 2010 household survey. Leakage from Zone 1 is mainly directed to stores in Godalming (11.6%) and Cobham (8.1%).

4.31 Looking at market shares for individual stores, the survey analysis shows that expenditure retained in the Borough is mainly drawn by the two out of centre superstores (Tesco, Ashenden Road and Sainsbury's, Clay Lane). Together these stores command over a third (35%) of expenditure from Zone 1. Guildford Town Centre retains a much smaller market share of expenditure from Zone 1 at 11.5%.

4.32 In summary, the market share analysis shows that convenience expenditure retention for stores in Guildford Borough has weakened since 2010, with market shares falling for the total study area and for Zone 1. Leakage is particularly notable in sub-zone 1c, which suggests the potential need to improve convenience provision to the south of the Borough.

Comparison Goods – Market Share Analysis

4.33 Comparison goods[28] are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods (also see Glossary of Terms). The household survey comprised of questions on the following main non-food expenditure categories, as defined by Experian Business Strategies:

- 'clothing and footwear' (question 8);
- 'recording media for pictures and sound' (such as records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (question 10);
- 'audio visual, photographic, computer items' (such as stereos, radios, TVs, software, cameras, kindles, ipads, telephones, etc.) (question 11);
- 'all other electrical goods including domestic electrical appliances' (such as irons, kettles, fans, coffee makers, food mixers), white goods (fridges, freezers, dishwashers) and smaller etc), (question 12);
- 'shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials', (question 13);
- 'games & toys; pets and pet products; hobby items; sport, camping goods and bicycles; and musical instruments', (question 14);

[28] Please note that comparison goods and non-food shopping have the same meanings.

- 'personal/luxury goods including jewellery, china, glass, medicine and cosmetics', (question 15);
- 'furniture, carpets, other floor coverings and household textiles' (includes beds, sofas, tables, etc), (question 16);
- 'DIY goods, decorating supplies and garden products' (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc), (question 17);

4.34 As for convenience goods, the updated retail capacity assessment draws on the overall market share analysis for all comparison goods shopping in the Borough (see Table 1 in Appendix 9). This has been derived by applying the market shares for the different categories of comparison goods to the comparable average per capita expenditure levels by goods type within each survey zone. This is an accepted approach as it provides a more accurate assessment of the distribution and weight of spend by respondents across each zone. The more detailed expenditure category approach means that the resultant market shares for centres and stores are not skewed by any particular comparison goods expenditure category. As a result, the analysis provides a more robust picture of overall shopping patterns for comparison goods.

4.35 Although Special Forms of Trading (SFT), including internet retailing, has been discounted from the market shares analysis in accordance with good practice, the household survey results show that Internet shopping is popular for certain comparison goods types, particularly purchases of audio and visual products, large domestic appliances and games, toys, etc., as shown in the table below. In contrast online sales accounted for a much smaller market share of clothing and footwear purchases. Multi-channel shopping is the latest retail trend, particularly with younger and lower income groups. It involves shoppers using a variety of shopping modes, sometimes simultaneously, including online, mobile phones, as well as "bricks and mortar" stores.

Table 4.3 Market share of Special Forms of Trading (%)

	Zone 1	Study Area
Clothes and Shoes	5.9%	8.0%
Recorded Media	64.0%	66.3%
Audio Visual	20.8%	27.5%
Domestic Appliances	14.7%	21.0%
Books and Stationary	24.3%	37.5%

Pets, Toys, Hobbies, Sports, etc.	23.1%	22.3%
Jewellery, gifts, and personal items	3.5%	5.3%
Furniture, soft furnishings, carpets and floor coverings, etc.	6.5%	9.5%
DIY, gardening, etc.	0.0%	1.0%
Total Comparison Goods	11.5%	14.4%

Source: HTIS, July 2014

4.36 Overall, SFT accounts for 14.4% of all comparison goods expenditure in the study area, which is higher than the national average identified by Experian for 2014 (11.7%). However, it is noted that comparison goods SFT expenditure for Zone 1 (combined sub-zones) at 11.5% compares with the national average. This may reflect better access to comparison goods stores in Guildford Town Centre compared to more peripheral zones that make up the wider study area.

4.37 Looking at in-store expenditure, the results of the market share analysis for the Borough as a whole are set out in Table 1 (Appendix 9). The key headlines are as follows:

- Shops in Guildford Borough retain 34.7% of total comparison expenditure in the study area (i.e. Zones 1 to 8), which represents an increase from 31.3% identified in the 2010 survey.
- The greatest proportion of expenditure is retained by Guildford Town Centre at 29.0%; an increase from 25.8% (2010 survey).
- Comparison expenditure retention is higher at 81.2% for Zones 1a, 1b and 1c, which broadly represent the Borough's boundary, and the retention level has increased from 78.9% in 2010. Guildford Town Centre's market share is 67.8% within Zone 1, which represents an increase from 61.2% in 2010.
- The comparison goods market share for local centres in the Borough is marginal; accounting for only 1.3% of expenditure in Zone 1 (combined sub-zones). This reflects the more limited provision of comparison retail offer in the Borough and Local Centres, and the role of Guildford Town Centre as the Borough's primary comparison shopping destination.
- Out of centre stores in Guildford Borough (including Ladymead Retail Park, standalone units on Woodbridge Road, and the Sainsbury's and Tesco superstores) command 5% of study area expenditure. This is in line with results from the 2010 household survey (5.3%). For Zone 1, the market share of out of centre stores increases to 12.1%; a reduction from 15.8% identified in the 2010 survey.

4.38 Expenditure leakage is low from the Zone 1 (broadly equivalent to the Guildford Borough area) at 18.8%. Although Woking and Godalming draw the most comparison expenditure from Zone 1, their market shares are relatively low at 4% and 3.8%

respectively. Looking at the sub-zones for Zone 1, leakage reduces to 12.0% for Zone 1a increasing to 38.9% for Zone 1c. The latter is influenced by the proximity of Godalming, which draws 16.1% of comparison expenditure.

4.39 Overall, expenditure retention for the Borough reduces in the more peripheral zones from Guildford Borough. This reflects the overlapping shopping catchments and competition from other centres and facilities within the study area. This is demonstrated in the table below, which identifies the nearest key centre for each zone and the corresponding market shares for Guildford Town Centre.

Table 4.4 Market shares per zone for comparison goods expenditure (%)

Zone	Nearest Centre	Guildford Town Centre Market Share		Guildford Borough Market Share
		2010	2014	2014
Zone 1 combined	Guildford	61.2%	67.7%	81.2%
Zone 2	Horsham/ Godalming	36.9%	38.9%	47.7%
Zone 3	Woking	18.1%	25.3%	29.5%
Zone 4	Woking/ Kingston-upon-Thames	12.1	8.2%	10.6%
Zone 5	Guildford/ Reigate/ Horsham/ Kingston-upon-Thames	21.7	26.6%	29.2%
Zone 6	Horsham/ Crawley	5.7	4.7%	5.6%
Zone 7	Aldershot	15.3	18.9%	23.9%
Zone 8	Godalming	36.4	46.2%	52.5%
Total Study Area		25.8	29.0%	34.7%

Source: HTIS, July 2014

4.40 The table shows that Guildford Town Centre has increased its market share across most of the study zones, apart from Zones 4 and 6. This may reflect the strengthening of retail offer in Kingston-upon-Thames and Horsham, which draw expenditure from these zones.

4.41 In terms of competing locations to Guildford, Woking and Godalming draw the greatest proportion of comparison expenditure from Zone 1, but this is relatively limited at 4% and 3.8% respectively.

4.42 The leakage of expenditure to other centres and shopping facilities increases in the more peripheral zones, due to their proximity to the population in these zones and overlapping shopping catchments (e.g. Zone 3 – Woking catchment, and Zone 6 Horsham catchment, etc.).

4.43 The market shares for stores in the Borough for the different types of comparison goods expenditure categories vary (see Tables 2-10, Appendix 9). The survey results show that the Borough retains the highest proportion of expenditure for fashion and footwear (43.8%) for the study area. This increases to 86.8% for Zone 1. Guildford Town Centre also commands the highest proportion of expenditure this category. Woking is the main competitor to Guildford for clothing and footwear shopping, with a market share of 15% across the whole study area; although this falls to 4% in Guildford's core area (i.e. Zone 1).

4.44 Market shares for 'bulky' goods shopping are the lowest for DIY and gardening products (25% for study area, or 79.2% for Zone 1) and pets, sports and hobby goods (25.3% for study area, or 69.0% for Zone 1). In both cases, Woking stands out as the main competitor to Guildford for these comparison shopping categories.

Competing Centres

4.45 The 2011 GRLSU found that the main destinations for comparison retail expenditure leakage were Woking and Kingston centres. This study update has also identified Godalming as a competitor for comparison expenditure in Zone 1.

4.46 In addition to these, there are a number of centres that are in a position to compete with Guildford. A summary of the role of these centres and development taking place in these areas is set out below.

Woking

4.47 Woking has one of the most significant draws for comparison expenditure from Zone 1, although this was still relatively low at 4%. The centre is well connected and located in close proximity to Kingston on Thames, which is another large and attractive town centre. As Table 1 (Appendix 9) shows, Woking commands 48.2% of total comparison expenditure from Zone 3 and a higher market share for convenience expenditure of 74.5%.

4.48 Woking Town Centre is classed as a primary regional centre and therefore performs a similar role to Guildford town centre. Woking Council has been encouraging investment into the town centre and is promoting a large mixed use scheme called *Woking Gateway*. The comprises housing and town centre uses including accommodation for A1, A2, A3 and A5 uses (10,967m^2 gross), hotel and conference centre, and leisure facilities (heath/ fitness and spa). Progress has been made with the selection of development partners Carisbrooke and Willmot Dixon's.

4.49 The most available data on Woking centre from Javelin VenueScore (2014/2015) showed that the centre is ranked at 137 of all centres in the UK (from 118 in 2009), but still far behind Guildford (ranked 32 in 2014/15 and 24 in 2009). However, there is concern that the lack of new retail development coming forward in Guildford Town Centre will increase leakage to competing centres.

Godalming

4.50 The household survey results show that Godalming is achieving one of the most significant draws for comparison expenditure; a 16.1% draw from the southern Guildford zone (Zone 1c) and a lower market share of 3.8% overall for Zone 1. The centre is located on the southern boundary of Guildford borough and is easily accessible from the borough's main settlements. This may explain why, despite being a relatively small centre (189 units according to the *Waverley 2013 Retail Study Update*), it still manages to draw some market share from Guildford itself. Given the relative lack of competition from centres to the south of the Borough, there is the potential for Guildford town centre to increase its market share from this area.

4.51 Due to Godalming's location, between designated Green Belt to the west and an Area of Outstanding Natural Beauty to the north, future development in the centre is constrained and likely to be limited.

Horsham

4.52 Despite its status as a secondary regional centre (and therefore operating at a lower level than Guildford in the hierarchy and network of centres), Horsham centre retains a relatively high proportion of expenditure from the zone in which it is located (zone 6). The centre is located to the south west of Guildford Borough, at the furthest limits of the study area. Due to its location and relatively small size the centre is unlikely to represent significant competition for Guildford centre. This is reflected in the market share analysis in Table 1 (Appendix 8 and 9), which shows that the centre draws less than one percent of convenience and comparison expenditure from Zone 1 (0.2% and 0.7%, respectively).

Kingston-upon-Thames

4.53 Kingston-upon-Thames is designated as a Metropolitan Centre within the London Plan and has been ranked within the top 20 shopping centres in the 2014/2015 Javelin VenueScore. Kingston is ranked at 18 (17 in 2009) and has maintained a similar ranking over the past five years (e.g. ranked 17 in 2009).

4.54 Centres like Kingston-upon-Thames are highly accessible from Guildford and have a good retail and leisure offer, including a John Lewis department store. There are some plans for major retail development in the town centre, including the 70,000m^2 mixed use redevelopment of the Eden Quarter. Although progress has been delayed following the termination of a deal with Hammersons, the Council has recently stated that they anticipate a planning application to come forward in 2014. Development is also taking place along the riverside with the first phase of Riverside Kingston opening this this year, which includes housing and leisure uses. A second phase comprising the remodelling of Bishop's House is due to commence in five years.

Other Centres

4.55 Other competing centres include Aldershot, which is located on the western boarder of Guildford Borough, and adjoins the neighbouring settlement of Ash. The centre has been defined in the most recent retail study (2010) as a secondary centre, and had around 288 units in total. The close proximity of the centre to settlements in the west of the borough means that it draws shoppers and expenditure from the Borough's main centres (particularly Ash District centre, due to its proximity). This is reflected in the market shares for Zone 7, which includes Ash and Tongham and identifies that 40% of food expenditure is attracted to stores in Aldershot.

4.56 Camberley is identified as a Secondary Regional Centre by Surrey Heath District Council and is an attractive alternative shopping destination, anchored by the new Atrium Shopping centre which opened in 2008. The draft *Town Centre Action Plan* **also proposes the development of an additional 41,000m^2 of retail floorspace, including a major new retail development with a comparison goods anchor store and car parking on London Road.**

SUMMARY

4.57 In summary, for food and convenience goods retailing, the household survey results shows that retention levels vary across the study area. Within Zone 1, retention was high in the central zone (1a) and the majority of expenditure was captured by the large out-of-centre foodstores (Sainsbury's at Clay Lane and Tesco at Ashenden Road). However, the results show that the market shares of stores in the Borough have fallen since 2010, both for the Zone 1 and the study area as a whole. This suggests the potential need to encourage greater market share retention, which could be achieved through improved convenience retail offer; particularly to the west of Guildford (i.e. Ash and Tongham). It should be noted that online shopping is currently achieving a low market share for main food shopping purchases for zone 1 and the wider study area; particular compared to the national average.

4.58 The results of the comparison shopping market share analysis shows that stores in Guildford Borough retain a high proportion of expenditure from Zone 1, with majority of expenditure directed to the town centre. However, the expenditure retention falls steadily for zones beyond the Borough area, corresponding with increased competition from neighbouring centres and shopping facilities, and overlapping catchments. In contrast to the results for convenience goods retailing, stores in the Borough have increased their market share of comparison goods expenditure across Zone 1 and the wider study area. This is a positive indication of the town centre's overall attraction and offer as a shopping destination, and may also reflect new investment in the town centre over recent years by retailers and leisure operators in recent years (including Anthropologie, Jamie's Italian, Five Guys, G Live, etc.). It should be noted that the market share analysis only reflects current shopping patterns and expenditure flows.

5.0 GUILDFORD TOWN CENTRE HEALTH CHECK

5.1 This section sets out the updated health check assessments for Guildford Town Centre and sets out the methodology used to assess vitality and viability.

5.2 Health checks help to inform the overall assessment of the vitality and viability of town centres for both plan-making and decision-taking purposes. There are a number of Key Performance Indicators (KPIs) that when considered together help determine the attraction and performance of centres for shopping, leisure and other activities, including:

- **The diversity of uses (e.g. retail, leisure and services offer);**
- **Retailer representation;**
- **Vacancy levels;**
- **Retailer requirements;**
- **Rents and yields;**
- **The quality of the town centre environment;**
- **Accessibility and parking provision;**
- **Footfall;**
- **Crime and safety; and**
- **Perceptions of the town centre.**

5.3 In this case we have drawn on a wide ranging evidence base and datasets (where available), including town, district and local centre surveys provided by the Council. We have also drawn on published datasets such as Experian and CoStar. In addition, CJ also carried out site visits and audits of the Borough's other district and local centres in July 2014, as well as the Borough's out-of-centre shopping and leisure facilities. Where possible, the findings of the updated health check assessments have been compared with the 2011 GRLSU to help identify any significant changes in the overall vitality and viability of the Borough's main centres.

GUILDFORD TOWN CENTRE

5.4 Guildford Town Centre is a popular shopping and leisure destination and is the largest retail centre in Surrey. As such, the town has a very important role in supporting the Borough's economy and meeting the shopping and service needs of the population. Previous audits commissioned by the Council (*Guildford Vitality and Viability Report 2011 and 2013***) and the** *2011* **GRLSU confirm that the centre performs well in terms of comparison goods retail, but there is an under provision of convenience floorspace, particularly when compared to competing centres. In terms of commercial leisure, provision is generally strong in Guildford Town Centre and this has been further**

improved by the opening of the new *G-Live* centre in 2012; a new entertainment, conference and hospitality venue.

5.5 The centre has three main covered shopping centres; The Friary Centre, White Lion Walk and Tunsgate Square. A traditional street market is held Friday to Saturday on North Street, and a Farmers' Market takes place on the first Tuesday of every month. From our audits of the town we noted that the Farmers' Market was popular and appears to be attracting shoppers and footfall to this area of the town centre.

5.6 Character areas include the main High Street, where the highest proportion of national multiple comparison retailers can be found; North Street, where the Friary Shopping Centre is located; and Chapel Street, which is characterised by medieval streets and up-market boutiques and specialist shops.

Town Centre Boundary and Shopping Frontages

5.7 The 2003 Local Plan town centre boundary for Guildford Town Centre covers the central shopping areas in and around High Street and North Street, and extends beyond to encompass a wider area. The town centre boundary broadly follows key roads including:

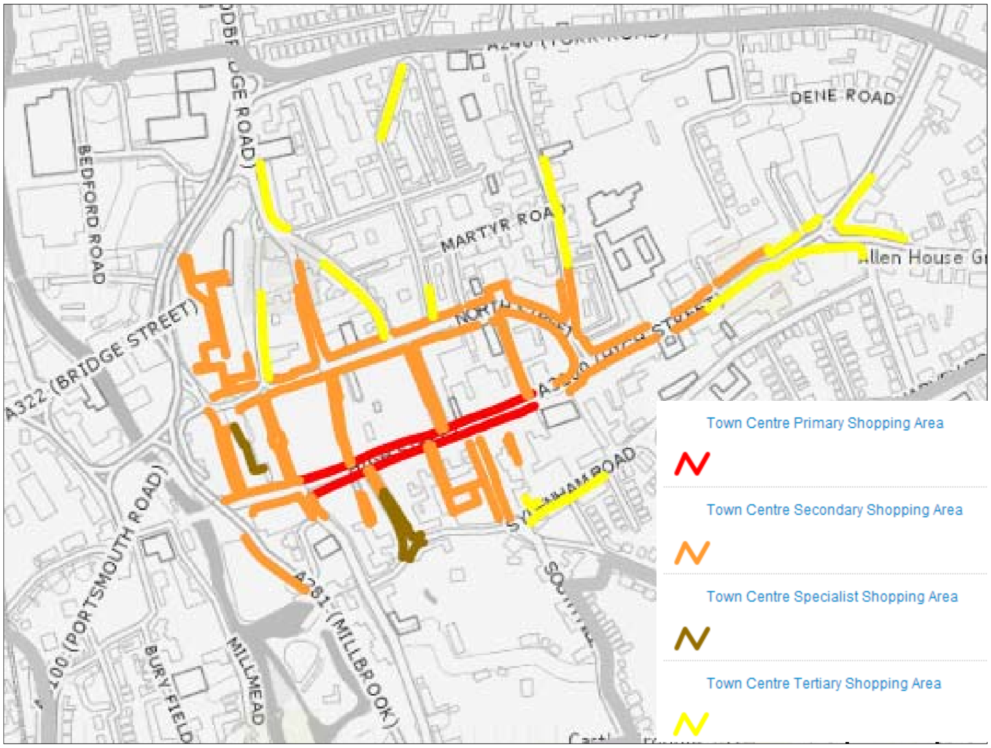
- York Road along the northern boundary;
- Waterden Road for the eastern boundary;
- Harvey Road for the southern boundary; and
- Agraria Road for the western boundary.

5.8 The draft 2013 Local Plan proposes amendments to the current town centre boundary to exclude small residential areas along the eastern and western boundaries, and to include an area of mixed uses further north of the 2003 boundary. In addition, the Draft Local Plan also identifies a slightly wider Primary Shopping Area (PSA) boundary, which includes North Street and the Friary Centre.

5.9 A map of the primary, secondary, specialist and tertiary shopping areas is set out in Figure 5.1 and is reproduced from Guildford Council's 2003 Local Plan Proposals Map. In the 2003 plan the primary shopping area is defined as including the south-western end of the High Street where the main cluster of national multiple stores are located and where the highest retail rents are found. The secondary frontage includes North Street, Upper High Street and lanes running between High Street and North Street. Tertiary and specialist frontages are more sparsely located, and are concentrated in the roads to the north of North Street and along the eastern end of High Street.

5.10 Although categorised as a secondary shopping frontage, a number of national multiple fashion retailers front on to North Street, including those within the refurbished Friary Centre (e.g. Urban Outfitters) in addition to French Connection, Laura Ashley and the Edinburgh Woollen Mill. There is also an entrance to House of Fraser department store from North Street.

Figure 5.1 Guildford Core Shopping Areas



Source: Guildford BC Local Plan Interactive Proposals Map (2003)

5.11 **SP's audit and site visit of the centre has updated the results of the Council's 2013 survey. The headline findings are as follows:**

- **The primary shopping frontage continues to have the highest proportion of A1 uses (82%). However, the proportion of A1 on the primary frontage has decreased from 84% in 2012.**
- **Similar trends have occurred across the secondary frontages, which also experienced a small reduction in the proportion of A1 uses (from 67% to 65%); although tertiary frontages saw an increase in A1 uses (from 32% to 34%) over the same period.**
- **Vacancy rates have fallen since 2011 across the primary, secondary and tertiary shopping frontages. Overall, vacancy rates have fallen from 16% in 2011 and to 13% in 2014.**

Diversity of Uses

5.12 **Guildford town centre was surveyed by the Council in May 2013 and recorded the current use and occupancy of units along the town centre primary, secondary and tertiary frontages (as defined by the 2003 Local Plan). This was updated by CJ following a site visit conducted in July 2014 (referred to as 'the 2014 data').**

5.13 **A full breakdown of the uses found in Guildford town centre's primary, secondary, tertiary and specialist shopping frontages is set out in the table below. This provides a comparison between the 2014 data (based on the Council's 2013 Town Centre survey and SP's update for 2014) and the Council's earlier 2011 Town Centre survey.**

Table 5.1 Guildford Town Centre: Diversity of uses (number of units)

Use Class	2011 (units)	*2011 %*	2014 (units)	*2014 %*	2010-2014 change (units)
Convenience	10	*2%*	15	3%	5
Comparison	273	*51%*	253	48%	-20
A1 Service	22	*4%*	40	8%	18
Financial & professional	46	*9%*	50	10%	4
Food & drink	73	*14%*	79	15%	6
Vacant	84	*16%*	68	13%	-16
Other	26	*5%*	21	4%	-5
Total	534	-	526	-	-8

Source: GBC Town Centre Survey 2013 (CJ Updated 2014) and 2011

5.14 **The table shows that overall there has been a small reduction overall in the number of units in the town centre, which probably reflects the fact that some units have been merged or redeveloped to provide larger format shops.**

5.15 **Within the uses however there has been a notable shift in the number of comparison and service units (which include dry cleaners, hair dressers, opticians, post offices and travel agents), with a reduction in the number of comparison units by 13 and an increase in the number of service units by 18.**

Retailer Representation

5.16 **There has been a small increase in the number of convenience units in the town centre from 2011 to 2014 as shown in Figure 6-2. Notably, a new Morrisons Local store has recently opened on High Street. Overall, foodstore provision in the town centre remains low. However, the planned opening of Waitrose on York Road will enhance the offer and assist in attracting convenience shoppers to the town centre.**

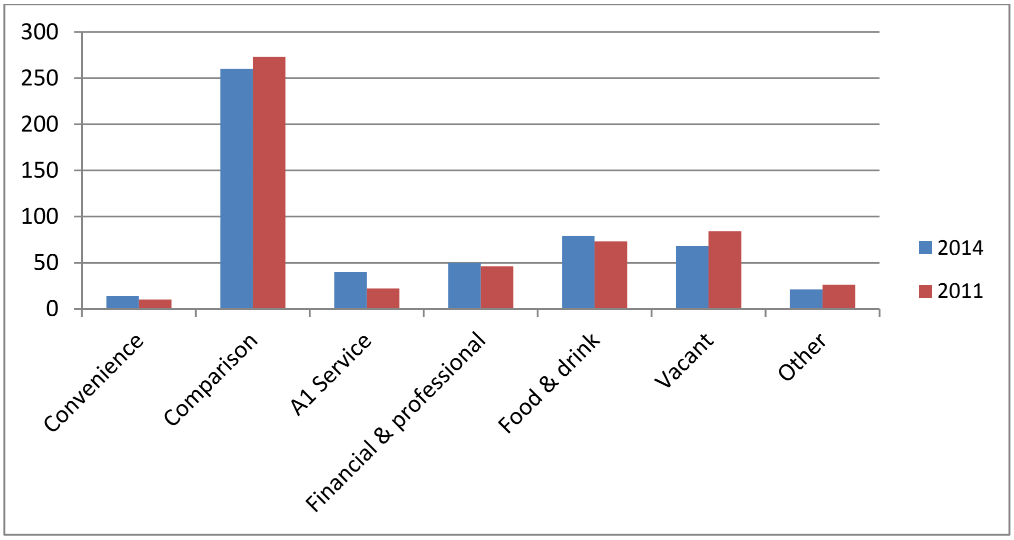
5.17 **Over the same period, there has been a reduction in the number of comparison units, although comparison still accounts for a relatively high proportion of retail provision overall in the centre – around 47% of all units. Comparison retail in Guildford town centre also continues to maintain a good representation of national multiples and includes three anchor department stores; Marks and Spencer, House of Fraser and Debenhams.**

5.18 **There has also been a significant increase in the number of A1 service uses, predominantly opticians and hair dressers, which have almost doubled in number from**

22 units in 2011 to 40 units in 2013. Comparison with the 2011 survey indicates that the majority of these new A1 service units have resulted from a change of use from comparison use.

5.19 **There has also been a small increase in the number of food and drink (A3, A4 and A5) units in the town centre by 4 units.**

Figure 5.2 Retailer Representation 2014 and 2011 (units)



Source: GBC Town Centre Survey 2013 (CJ Updated 2014) and 2011

Vacant Units

5.20 **Vacancy levels provide one of the key indicators for assessing the relative performance of centres and how they have changed over time. There are different methodologies used to assess vacancy levels for a town centre. This retail study has drawn information from the Council's survey of town centre frontages (updated by site visit in 2014).**

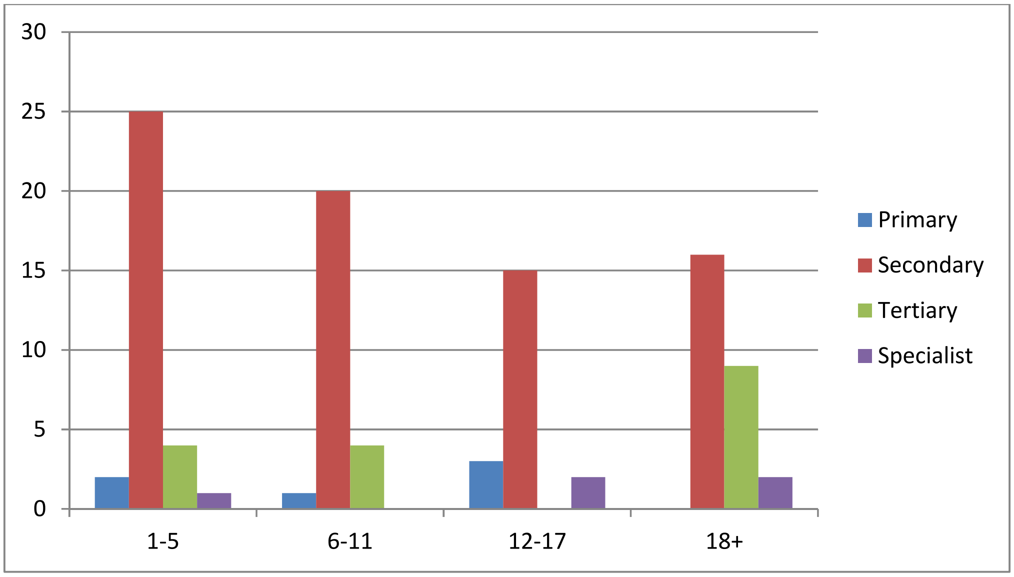
5.21 **Overall, town centre vacancy rates for the main shopping streets in Guildford have been falling in recent years, from a high of 16% in 2011[29] to 13% in 2014. This is broadly in line with the current UK average of 12.5% (according to Experian GOAD). The Council's data shows that some 31% of the units that were vacant when surveyed in 2013 had been vacant for a relatively short period (between one and five months). Nevertheless, over a quarter (26%) had been vacant for 18 months or more, as set out in the chart below.**

5.22 **Across the primary shopping frontages, the vacancy rate is low (6%). The majority of vacant units are located on secondary shopping frontages. The July 2014 site visit confirmed that vacancy rates remained broadly unchanged in the centre, though there**

[29] Shop Vacancy Report, Local Data Company (first half of 2011)

had been a change from vacant to occupied and vice versa in 5% of the total retail units.

Figure 5.3 Town centre vacancy period (months)



Source: GBC Town Centre Survey 2013

5.23 The site visit found positive signs that a number of previously vacant units have been recently occupied, with a few multiple brands moving into the centre; including a new Anthropology fashion store and a Reebok footwear store, both opening on the main pedestrianised area of the High Street.

5.24 The Friary Shopping Centre benefitted from renovation works in 2011 and is performing well and has been successful in attracting new brands to Guildford (such as Hollister and Republic). The recent investment has had a significant impact on vacancy rates in the Friary shopping centre, which fell from 38 vacant units (51%) in 2011 to just 11 vacant units (17%) in 2014[30]. The site visit confirmed no change in the number of vacant units in the town centre, although some movement had taken place within the centre. For example, HMV has moved to a smaller unit within the Friary Centre. This is in line with a general trend by the retailer HMV, where competition from online sales has led to store closures and smaller floorspace requirements.

5.25 White Lion Walk, an indoor shopping centre running between the High Street and North Street, has a vacancy rate of 33% (7 units in total), which remains unchanged from 2011. However vacancy levels may fall in the short to medium terms following planned improvement works (11/P/01500), which involve an additional 163m^2 retail floorspace and an increase in the size of three units by 21.5m^2.

5.26 There are a high number of vacancies to the north of the centre, particularly along Woodbridge Road, Leapale Road and Heydon Place; which form part of the North

[30] GBC Town Centre Survey 2011 and 2013

Street development site that is currently pending redevelopment (further detail is provided in the sub-sections below).

5.27 The site visit also identified a high number of vacancies along the narrow, pedestrianised streets that join North Street and High Street, including Angle Gate, Market Street and Jeffries Passage. These are secondary shopping frontages that are generally occupied by small independent stores. Footfall along these streets was observed to be low during the site visit and around 30% to 40% of units were vacant.

Retailer Requirements

5.28 Retailer demand for representation in a shopping location normally provides a good indication of a centre's overall attraction, health and viability. The CoStar Focus national retailer requirements database is a standard published dataset used to inform retail assessments. The CoStar dataset is helpful in as much as it provides consistently sourced evidence detailing the changes in retailer requirements over a period of time, and also ranks centres nationally in terms of their total requirements.

5.29 The latest CoStar Report recorded 64 requirements for Guildford from January 2013 to August 2014; representing a total maximum floorspace requirement of 62,208m^2 gross (see Appendix 6). Those operators with a stated interest include a mix of national multiple A1 retailer brands and service/leisure operators, as set out in Table 5.2.

Table 5.2 Multiple Retailer Requirements in Guildford Town Centre

Category	Operator
Comparison/ Convenience	Joules Clothing; Fossil; Comptoir des Cotonniers; Moshulu; Rituals; Princesse tam.tam; Cycle Surgery; Majestic Wine; Game Stores Group Ltd; Iceland.
Service/ leisure	Café Nero; Chiquito (restaurant); Paul Boulangerie; Costa; Curzon Cinemas Ltd; Eclectic Bar Group.

Source: CoStar FOCUS, August 2014

5.30 The identified floorspace requirement from Iceland is up to 750m^2 gross in Guildford.

5.31 Of particular note, Curzon Cinemas Ltd registered a requirement for up to 1,400m^2 in a High Street or edge of town location. The Electric Bar Group, one of the UK's leading restaurants, club & bar operators, has also published a requirement for up to 750m^2 of floorspace.

5.32 In total, this includes requirements from 40 comparison retailers, one convenience retailer and 20 service operators. Reference to the 2011 GRLSU indicates that Guildford had some 50 requirements at the time this study was prepared, including Urban Outfitters (now located within the Friary Centre), Trailfinders and Costa Coffee.

5.33 The rise in the number of requirements 'bucks' the trend of declining requirements experienced by most UK centres over the last 5 years, which has occurred as a result

of the economic downturn on market demand and investment activity. This positive trend in Guildford is likely to be a result of the centre's profile as an important shopping destination.

5.34 Finally, it should be noted that many retailers now prefer not to publish their requirements as it could damage their negotiating position where they are seeking representation in new locations. We are aware that a number of major high street retailers have unpublished requirements for Guildford including Zara, Penhaligons, Fenn Wright Manson, Bravissimo, Apple and Oliver Sweeney. Moreover, such databases such as CoStar, can only identify the current level of market demand and do not reflect how demand might change in the future following new development and investment. For example experience shows that a new scheme that offers retailers modern, well configured floorspace adjacent to like-minded tenants in a prominent location will generally generate a significant uplift in market interest and demand.

Commercial Indicators

5.35 Retail rents in Guildford have fallen from a peak in 2011 of up to £300 per ft^2 in prime areas. The *2011 Vitality and Viability* **report found that prime rents in Guildford had been increasing at a greater rate than competing centres Reading, Basingstoke and Kingston. However, rents in other areas of the centre were found to have remained fairly static. A Colliers International report which commented on these trends in Guildford in 2010/11 noted that the rise of prime retail rents in Guildford was most likely due to two factors; (i) the affluent nature of the population which helps to boost retail sales, but also (ii) the lack of supply of prime retail stock, further exacerbated by the delays in planned developments like the Friary Centre planned extension.**

5.36 Since 2011 retail rents in primary shopping areas in Guildford have fallen, but recent reports indicate that they have started to increase again. Based on evidence set out in the CoStar Analysis Reports, and our discussions with local property agents, we understand that rents for retail properties in the primary retail areas along High Street currently stand at between £280 and £290 per ft^2. There have been a number of high quality store openings along High Street which have pushed rents up and maintained higher levels of trading along this stretch of primary frontage.

5.37 Along secondary shopping frontages, including the eastern end of High Street, and along North Street, rents have remained fairly static, achieving between £120 per ft^2 and £150 per ft^2.

5.38 It should be noted that the rents achieved along the High Street's primary shopping frontage are significantly above the average rental values identified by Colliers International for all centres in the South East (Autumn 2012) of £103 per ft^2.

Pedestrian Counts

5.39 Footfall data supplied by Guildford Borough Council is based on pedestrian counts undertaken by Springboard. Counts are recorded at two locations in the town centre: High Street and North Street. The results are provided in Appendix 7.

5.40 The most recent analysis of footfall in August 2014 revealed an increase in footfall from the previous year at High Street (+21%) and North Street (+4.4%). Overall, pedestrian footfall increased year-on-year for the town centre as a whole by +15.5%. This is a considerable improvement from recordings in 2013, which indicated a drop in year on year footfall by -5.3%.

5.41 The footfall analysis shows that Saturday lunchtime attracts the highest level of footfall in the town centre followed by the same time on a Friday.

5.42 Overall, the results indicate that Guildford is attracting more town centre users, which corresponds to an increase in the town centre's retail market share, as identified by the household survey.

Environmental Quality

5.43 The main primary shopping area in Guildford town centre is maintained to a high standard. The site visit conducted as part of this study confirmed that recent improvements had been made to the paving and public realm in some areas. The key shopping area around the High Street is well maintained and has a number of historic buildings that provide a high quality urban environment. The enhancements to the Friary centre have created an improved environment at the western end of North Street where there has been noted investment in new leisure provision (e.g. Jamie's Italian). Further investment in this area would be beneficial to this end of the North Street; particularly focusing on the entrance to Phoenix Court/ service entrance to White Lion Walk.

5.44 The urban environment to the north of the centre around the North Street redevelopment site is relatively poor. The rear of the Friary Shopping Centre is occupied by a large bus station and dilapidated buildings. The redevelopment of this area in line with current proposals for the North Street development should significantly improve the quality of the environment in this section of the town centre.

Accessibility

5.45 Guildford town centre benefits from high levels of accessibility by rail and by road. The centre is served by two rail stations, Guildford Station and London Road Station. Both of these stations are within around ten minutes walking distance from the main shopping areas. Fast trains are provided into central London and also to the District Centres and other surrounding centres, including Reading, Ascot and also Gatwick Airport.

5.46 The centre lies on Junction 10 of the M25 and is also linked to the A3, providing easy access into central London in addition to main roads travelling northbound (A1 and

M1), southbound (the M3), eastbound (the M2 and M20) and westbound (the M40 and M4).

5.47 There are some problems with congestion at peak times on the centre's one-way system and also high demand for car parking, although the Park and Ride service is helping to relieve these pressures of long-stay car parking in the centre. The 2008 *Town Centre Vitality and Viability* study identified some 5,255 public parking spaces in the centre, of which approximately two thirds were in multi-storey car parks and the remainder in surface car parks, with some small provision of underground parking. The 2013 Draft *Vitality and Viability Report* has stated that there has been little change in public parking spaces since the 2008 report was produced.

Crime and Safety

5.48 The *Index of Multiple Deprivation 2010*, which provides a measure of deprivation based on factors such as income, employment, health, education, housing and crime, showed the Borough of Guildford to be in the top 10% least deprived boroughs in England.

5.49 Measures to improve safety across all centres in the Borough include the Safer Guildford Partnership, which brings together representatives of the following organisations to help to tackle crime and disorder in Guildford:

- Guildford Borough Council
- NHS Surrey
- Surrey County Council
- Surrey Fire and Rescue Service
- Surrey Police
- Surrey Police Authority
- Surrey Probation Service

5.50 The *Safer Guildford Partnership Plan 2012-2014* details the main interventions which include street patrols such as the *Street Angels* which patrol the town centre on weekend evenings and nights and also the deployment of *Taxi Marshalls* at peak times to ensure safety for drivers and the public. The Partnership has also set up *Drive Smart*, a multi-agency initiative to target anti-social driving. There is also funding for youth groups to provide activities and events to divert young people from offending behaviour.

Perception of Guildford Town Centre

5.51 The household survey asked specific questions on respondents' views and perceptions of Guildford Town Centre as a place to shop and visit for a wide range of uses and attractions. This included establishing how frequently residents visit the town centre for shopping and leisure purposes, as well as identifying any key improvements

residents would like to see that might encourage them to visit Guildford more often for shopping and other purposes.

5.52 The key headline findings below focus on the responses in Zone 1 and its sub-zones (Zones 1a, 1b, and 1c), which is broadly equivalent to the Guildford Borough area, and the wider study area as a whole.

Frequency of visits

5.53 Respondents in Zone 1 are more likely to visit Guildford Town Centre for shopping purposes once or twice a week (39.5%) and are least likely to visit daily (2.3%).

5.54 Looking at the sub-zones, the level of frequency increases for Zone 1a, which covers Guildford Town Centre and its immediate environs. Here, 10% of respondents visit the town centre on a daily basis for shopping.

5.55 Based on total study area responses, the frequency of visits to Guildford Town Centre reduces, with respondents more likely to visit once every two months or less. On average, some 19% of all respondents stated that they never visit Guildford Town Centre; which is mainly attributed to response from peripheral study zones including Zone 4 (53.9%) and Zone 6 (36.6%).

Improvements to encourage more shopping trips

5.56 When asked what, if anything, respondents would improve in Guildford Town Centre that would encourage them to visit more, the majority in each zone stated '*nothing or very little'***.**

5.57 The table below provides a summary of the most frequently raised improvements:

Key improvement for shopping in Guildford Town Centre	Zone 1				Study Area
	1a	1b	1c	Total	
Better and/ or free or cheaper parking	24.3%	37.1%	64.5%	39.4%	50.6%
Better range of independent stores	13.8%	9.4%	14.7%	11.3%	6.6%
A particular store e.g. John Lewis and Waitrose.	21.4%	3.8%	1.6%	7.2%	2.5%
Better range of chain/ well known stores	9.5%	6.2%	4.2%	6.5%	4.0%
More attractive environment	0.0%	10.7%	0.0%	6.5%	2.0%
More easily accessible by foot or bike	3.3%	8.1%	0.0%	5.6%	1.2%

Source: HTIS, July 2014

5.58 The most popular suggested improvement was the need for *'better and/ or free car parking'* or *'cheaper parking'*, which was mentioned by over half of respondents (50.6%) across the study area. The weight of responses reflected the distance of respondents from Guildford (e.g. 24.3% in Zone 1a, compared to 72.5% from Zone 4). It is significant that the need for *'better and/ or free car parking'* or *'cheaper parking'* was mentioned by a high proportion of respondents in Zone 1c (64.5%). This may reflect the fact that a high proportion of visitors to Guildford prefer to travel by car in preference to other modes of transport (77.7% for respondents from Zone 1).

5.59 The need for more independent shops and chain stores was highlighted by respondents in the sub-zones for Zone 1 (11.3% and 6.5%, respectively). In particular, John Lewis and Waitrose were identified as stores that respondents in Zone 1 would like to see introduced to the town centre. The Waitrose store currently under construction on former Bellerby Theatre site on Leapale Lane and proposals for a new department store as part of the North Street site regeneration scheme will therefore greatly enhance the town's offer and attraction to customers in the study area and beyond.

Planned and Proposed Investment

5.60 In general, new retail development opportunities within Guildford town centre are constrained by a lack of suitable and/or available sites.

5.61 Currently the North Street site is the only location in the town centre with potential to accommodate major new retail floorspace. This would most likely be delivered as part of a mixed use scheme with housing and other town centre uses. The site is subject to a planning permission granted in December 2004 to provide an extension to the Friary Shopping Centre with residential accommodation. This was extended in 2010, but is due to expire 14 October 2015. Required pre-commencement conditions have not been submitted, and it is most unlikely to be implemented, as it includes a replacement bus station. . Notwithstanding this, new proposals are emerging in discussions with the other key landowner (alongside the Council), which are likely to consist of approximately 42,000m^2 of retail, food and drink, and leisure floorspace, which will include a new anchor department store (of between 11,00m^2 and 18,000m^2). A scheme is expected to be delivered over a five to ten year period.

5.62 Other recent key existing, committed and planned investment and development opportunities in the town centre include:

- Proposals for improvement works to White Lion Walk were approved in 2013, which will include improvements to the layout and a small amount of retail floorspace within this shopping centre.
- Approved refurbishment and extension to the Tunsgate Square Centre, approved in 2015 would slightly reduce the amount of retail and increase the restaurant / café floorspace.

- Planning permission was granted in February 2014 for the development of a 3,400m^2 Waitrose foodstore and 48 residential units on the old Bellerby Theatre development site. The store is expected to open in late-2015.

- Plans to develop Guildford railway station are likely to come forward in late 2014/ early 2015. The scheme is to be developed by Network Rail and Kier Property, and is likely to include a mix of retail, leisure (including food and drink)and residential uses.

5.63 Council monitoring also shows that, after accounting for change of use and subsequent loss of A1 space, there has been a total of 12,960m^2 of additional A1 retail space approved since the *2011 GRLSU*. The largest of these retail developments is the Bellerby Theatre convenience store retail scheme.

SUMMARY

5.64 Guildford Town Centre remains a vital and viable town centre. The centre has a number of key strengths and opportunities:

- A good comparison offer with a high representation of both independent stores and national multiple retailers, particularly along High Street and North Street;
- A well maintained shopping environment, clean streets and attractive historic points of interest;
- A good leisure and cultural offer, which will attract visitors to the centre;
- The newly renovated Friary Centre, which has led to a dramatic reduction in vacancies in the shopping centre;
- An overall reduction in the number of vacant units and in vacancy rates;
- Planned investment into White Lion Walk, which currently has high vacancy levels, and in the Tunsgate Square Shopping Centre;
- The redevelopment of the Bellerby Theatre site, which will improve the level of convenience provision in the centre and also enhance the area to the north of the retail core ;
- Emerging proposals for a new anchor department store to improve the anchor mix, and other retail floorspace as part of a future scheme for the North Street site will significantly improve Guildford's profile as a shopping destination;
- An increased number of retailer requirements, showing national multiples wanting to move into Guildford Town Centre, this would be likely to significantly increase should development of a further anchor store improve the anchor mix in the town centre;
- An opportunity to extend the primary retail frontage to include North Street, which now attracts a high number of retail and leisure multiples as well as incorporating the Friary Centre and the future development of the North Street site.

5.65 Notwithstanding this there are some potential weaknesses and areas for concern including:

- A poor convenience offer and no anchor foodstore in the centre, although this will improve somewhat with the opening of the new Waitrose store in 2015.
- A fall in the town's comparison goods offer, however this will be reversed should proposals for the North Street site be delivered.
- Continuing competition from neighbouring centres like Woking and Godalming.
- A continuing high level of vacancies along smaller, secondary shopping streets where footfall was observed to be generally low.

6.0 DISTRICT AND LOCAL CENTRES HEALTH CHECK AND OUT-OF-CENTRE RETAIL PROVISION

6.1 The section sets out the findings of the health check assessments for Wharf Road, Ash District Centre and Station Parade East Horsley District Centre. An overview is provided on the Borough's Local Centres and out-of-centre retail facilities

DISTRICT CENTRES

6.2 Station Parade (East Horsley) and Wharf Road (Ash) are the Borough's two main District Centres based on the settlement hierarchy identified in the Guildford Borough Local Plan (2003). These centres are larger than the local centres, although still small in size, each having around 30 units (not including residential).

Station Parade, East Horsley

6.3 Station Parade, East Horsley district centre has a high quality and well used retail offer and is generally occupied by good quality older buildings. It consists of around 32 units in total. There were no recorded vacant units in this district centre in the 2014 council survey, which was confirmed by the site visit. This centre has a Budgens convenience store, supplemented by a number of smaller convenience stores. The Budgens is 190m^2 gross and approximately 90% of its sales area is set aside for convenience floorspace. The store was well stocked and was busy, with queues at the tills when visited on a weekday afternoon.

6.4 The urban environment is clean and well maintained, and the Parade itself is particularly attractive with historic buildings making up the majority of the stores. There were no vacant units. There was limited parking available along the Parade when visited on a weekday afternoon.

6.5 Since the *2011 GRLSU*, the Costcutter has changed ownership to become the Horsley Village Store. This offer is supplemented by a number of smaller stores, including a wine shop, butchers, a bakery and newsagents. Stores in this centre tend to be independent and of a high quality, reflecting the affluent nature of the surrounding catchment area.

6.6 The comparison offer consists mainly of independent retailers and includes a home furnishings store, two charity stores and gift shop. A unit that was vacant in 2012 is now a funeral service. There are also three hairdressers, a beauty parlour, three estate agents, two banks, a pharmacy, post office and a laundrette. There are four restaurant/ cafés and one take away.

6.7 It is noted that there is limited opportunity to support further development of floorspace for retail, leisure and service uses within the defined centre boundary. However, there could be a potential opportunity to redevelop the existing car park to the rear of units along the eastern carriageway of Station Parade. The car park is owned by Guildford Borough Council and could support the development of new supermarket. However, development of the site would require consideration of existing car parking provision, which is limited for the centre. There is also potential to contract the existing centre boundary to exclude dwellings at Horsley Court.

Wharf Road, Ash

6.8 Wharf Road, Ash District Centre is a similar sized centre, with 36 outlets. The site visit confirmed that the centre is well maintained, having planted flower boxes and a generally clean urban environment. The parade was quiet when visited on a weekday at lunchtime. There were no vacant units along the main parade, but the former Public House off the main parade is boarded up and a former Spar on Shawfield Road is also currently vacant.

6.9 The key convenience store is a Budgens, with a total floorspace of 415m^2 gross, of which approximately 95% is convenience floorspace; there is also a post office within the store[31]. The store was well stocked, but was not very busy when visited on a weekday afternoon. Since the 2011 GRLSU, a Spar Food and Post Office convenience store opened in Ash, occupying a smaller unit on Shawfield Road. However, this unit was found to be vacant on our site visit, though the 2014 Council Survey shows the unit to now be occupied. The centre's convenience offer is supplemented by the nearby Ash Vale local centre and also the stores on Ash Street which include a Co-op, a Londis and a One-Stop shop. However, convenience provision will be enhanced following consent in late 2013 to convert The Standard public house on Ash Hill, immediately outside the District Centre's boundary, to accommodate a 401m^2 (gross) Morrison Local store.

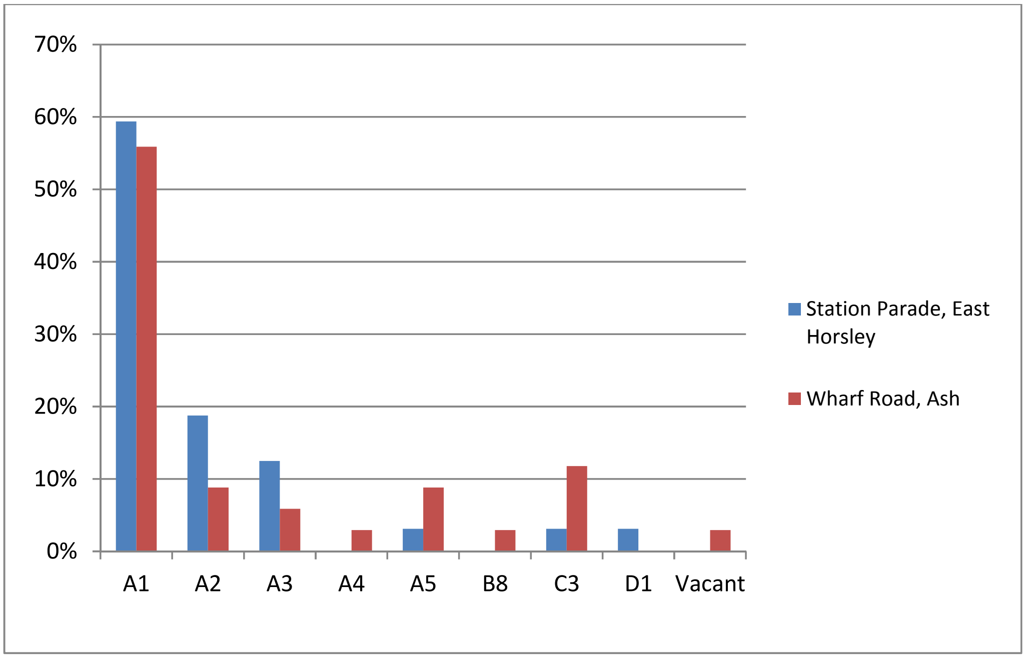
6.10 The centre's comparison offer is dominated by independent stores and is generally of a lower quality than Station Parade, East Horsley. The 2014 survey identified two charity shops, two gift shops, and a furniture store. The remaining offer includes three hairdressers, a nail parlour, opticians, a laundrette, pharmacy, funeral service, estate agents and a betting shop. There are also three take-aways, a restaurant and a café. This offer has remained generally unchanged since 2011. As stated in the *2011 GRLSU*, there may be an opportunity to improve the food and beverage offer in Wharf Road, Ash District Centre, which is currently dominated by take-aways.

6.11 Similarly to Station Parade, East Horsley District Centre, there are limited development opportunities in Ash Wharf to accommodate new retail, leisure and service floorspace. Consideration should be given to extending the existing centre boundary along Ash Hill Road to include a number of retail units (no.s 147 to 153) and the community centre. The inclusion of these units would help strengthen the retail offer for the centre with

[31] Guildford Retail and Leisure Study 2011

the community centre providing the potential opportunity for development in the future.

Figure 6.1: District Centre Diversity of Uses 2014



Source: GBC District Centre Survey 2014 and CJ 2014 site visit

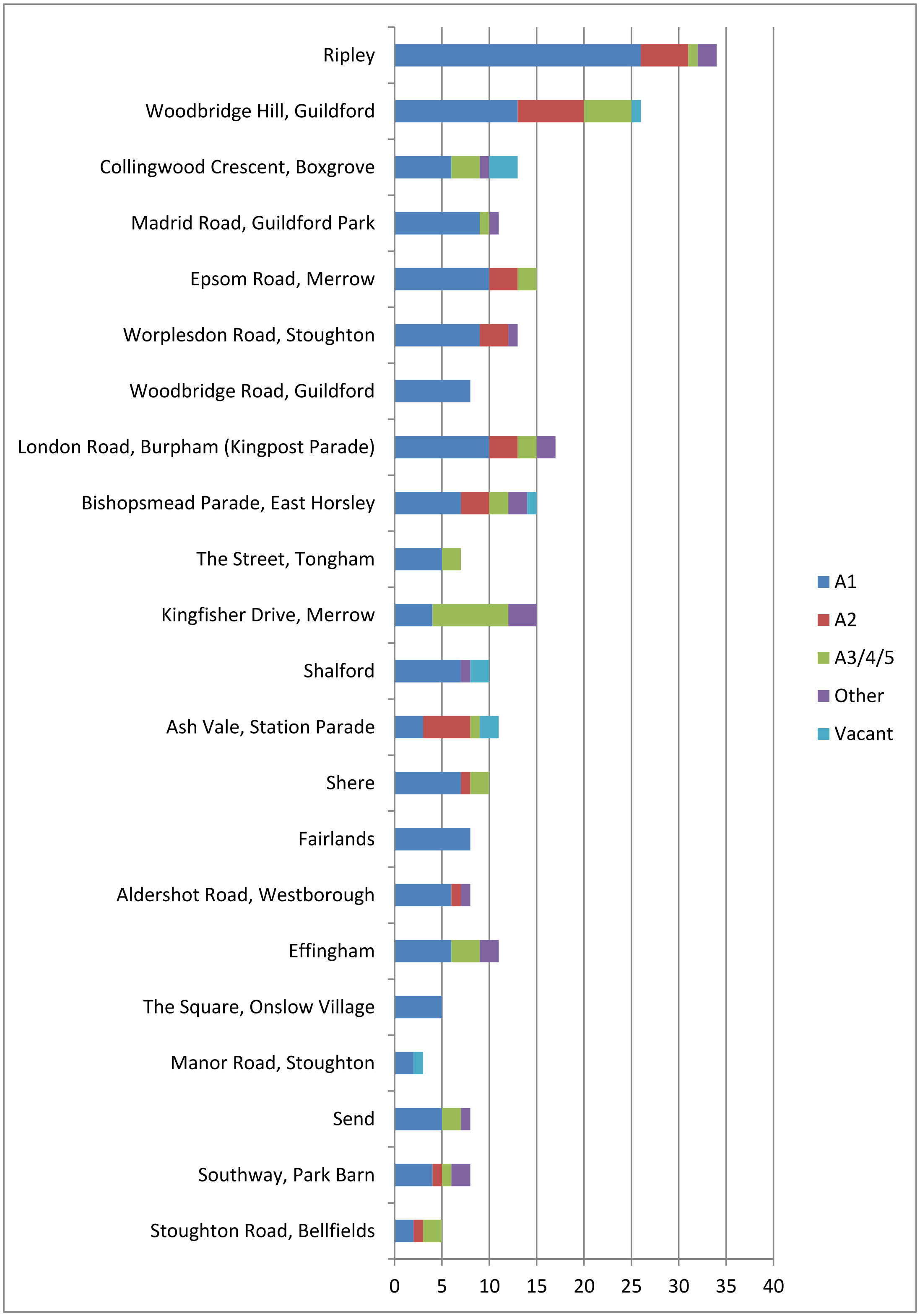
LOCAL CENTRES

6.12 The Borough has 22 Local Centres as identified in 2003 Local Plan. These centres offer a more limited range of retail and services that meet the basic day-to-day needs of their local population. The majority of these are located in the urban areas of the Borough, although seven are located within villages (East Horsley, Effingham, Fairlands, Ripley, Send, Shalford and Shere).

6.13 The Council conducted a survey of provision in the Borough's 22 Local Centres in 2013. The majority of the Local Centres have around ten units in total with a focus on convenience and comparison retail provision. Their offer generally includes a small convenience store, supplemented by a newsagents and/or greengrocers, bakery, etc. for larger centres. Most, but not all centres, have some service provision including a hairdressers/ barbers, a bank, post office, GP surgery and estate agents. Most Local Centres also had some form of food and drink offering, generally cafés, pubs and/or take-aways.

6.14 A summary of the survey results in respect to the diversity of uses for each of the Local Centres is set out in Figure 6-4.

Figure 6.2 Local Centres Diversity of Uses 2014



Source: GBC District Centre Survey 2014

6.15 As Figure 6.2 shows, the largest of the centres are Ripley with 34 units (excluding B and C uses), followed by Woodbridge Hill (26 units) and London Road, Burpham (20 units). These larger centres include a greater range of comparison stores than the smaller centres, offering for example home furnishings, children's toys and bikes/ motorcycles. They also have a wider range of service offer, including more than one bank, hairdresser and restaurant/ café. It should be noted that these larger Local Centres, particularly Ripley, could be seen to perform a similar role and function as the two District Centres at Ash and East Horsley.

6.16 The smallest Local Centres in Guildford include Kingfisher Drive, Manor Road, Southway and Send, each with four to five units broadly including a small convenience store, a pharmacy, hairdresser and/or post office.

6.17 There were generally very low vacancy levels, with most centres having no vacant units. With the exception of The Square, Onslow Village (which had one vacant unit out of six in total), the smaller centres were not found to have any vacancies. The larger centres had between one and three vacancies each, though this does not represent a high proportion of the total number of units.

6.18 As part of the assessment we have examined the potential to identify sites to accommodate new retail development within the existing Local Centres. In some cases this may require the extension of centre boundaries to encourage the development of those sites. Conversely, we have identified Local Centres where retail and service uses have become fragmented and would benefit from a contracted centre boundary and potentially re-designated as neighbourhood centres. In addition, we have highlighted Local Centres that function beyond the role of a Local Centre and would benefit from a higher ranking in the retail hierarchy (i.e. District Centre). This would assist in delivering new retail and service uses where they are needed; in particular responding to those centres that will be under increased pressure from planned housing.

6.19 A summary of observations are provided in the table below, which focus on Local Centre that would benefit from policy changes in respect to centre boundaries:

Local Centre	Overview	Recommendations
Ripley	A relatively large centre boundary with a strong retail and service offer that goes beyond the role and function of a Local Centre. There are limited sites within the centre boundary to accommodate new town centre uses.	Potential to designate as a District Centre to reflect the current function of the centre. Extend the centre boundary to include potential sites for retail, leisure and service provision.
Woodbridge Hill	A strong mix of retail, service and leisure uses that are contained within a somewhat dispersed centre boundary.	A number of key centre facilities (Woodbridge Hill Surgery and The Wooden Bridge public house) are located just

Local Centre	Overview	Recommendations
		outside the boundary, which could benefit from inclusion within an extended boundary.
Worplesdon Road	Retail and service uses are focused along the western carriageway of Worplesdon Road. The centre boundary.	The centre boundary could be revised to exclude the dwelling located adjacent to no 204 Worplesdon Road.
London Road, Burpham (Kingspost Parade)	The centre boundary comprises retail and service uses located contained along a linear parade. Planning permission was granted for an Aldi store, located adjacent to the parade.	Consideration should be given to extending the centre boundary to include the Aldi store site within the centre boundary, which would anchor the centre's retail offer.
Woodbridge Road	The centre benefits from a good mix of retail, leisure and service uses contained within a compact linear parade.	There is potential to include the Best Service Centre (MOT garage) within the centre boundary, which could support alternative retail, leisure or service uses in the future.
Shalford	Town centre uses have become fragmented due to the change of use of commercial units to residential.	The centre would benefit from the contraction of the centre boundary. This should include retail and services uses to the western end of Kings Road; including the existing grocery store (Snooty's Groceries) north of the existing centre boundary.
Madrid Road	Existing retail and service uses are fragmented and dispersed within the existing centre boundary.	Consideration should be given to contracting the centre boundary to focus on retail and service uses concentrated to the east of Madrid Road (Units 2-14 and 5-11).
Shere	Town centre uses have become fragmented due to the change of use of commercial units to residential.	The centre would benefit from the realignment of the centre boundary to include the Welcome store/ post office on Middle Street and the commercial and community uses on Gomshall Lane.
Ash Vale	The existing centre boundary is bisected by a railway line. Therefore retail and service uses are somewhat	Demand for retail and services in Ash Vale are likely to increase in the future due to significant planned housing in the Ash and

Local Centre	Overview	Recommendations
	dispersed. A Tesco Express opened in 2013 on Lyson's Avenue.	Tongham area. Consideration should be given to the inclusion of the Tesco Express site within the centre boundary to strengthen the profile of the centre.
The Street, Tongham	The centre boundary comprises a small parade of shops with no potential to accommodate new retail and service offer. Considerable housing is planned for the area which will increase demand for local services.	Potential to extend the centre boundary to include adjacent commercial and leisure units. Inclusion of the D&M Engineering unit has the potential to accommodate a small convenience unit in the future.
Manor Road, Stoughton	Retail and service provision has diminished, which suggests a lack of consumer and market demand for retail provision.	The centre no longer performs the role and function of a Local Centre. Consideration should be given to the removing the centre from the retail hierarchy.
Kingfisher Drive, Merrow	Whilst the level of retail and services within the centre is limited, existing businesses benefit from footfall from nearby GP surgery and primary school.	Consideration should be given to extending the existing centre boundary to include the GP surgery, which serves as a key local facility.
Local Centres – no change required		
Epsom Merrow	Collingwood Crescent	
Bishopsmead Parade, East Horsley	Effingham	
Fairlands	Stroughton Road, Bellfields	
Aldershot Road, Westborough	Southway, Park Barn	
Send	The Square, Onslow Village	

6.20 Policy 2 of the draft Local Plan also identifies the potential to create new Local Centres at three strategic housing sites in the Borough including:

- New settlement at the Wisley former airfield;
- Slyfield area regeneration project (SARP); and
- Strategic extension to Guildford Urban area at Gosden Hill Farm.

6.21 Policy 2 of the Local Plan sets out the plans for the Gosden Hill urban extension to include a local centre providing for everyday shopping and service needs. The potential for new convenience and comparison retail provision within the planned strategic housing sites is considered in more detail in Section 7.

OUT OF CENTRE RETAIL PARKS AND STAND ALONE STORES

Retail Parks

6.22 Appendix 4 provides identifies the location of out of centre retail parks and stand-alone sites within the Borough and wider study area. There are two main retail parks in Guildford, (Ladymead and Woodbridge Road), located adjacent to one another.

6.23 Ladymead is the larger of the two and contains ten units occupied by a mix of bulky goods retailers, some general comparison retail and a fast food restaurant. The units are generally of a high quality/ well maintained and two are currently vacant to allow for refitting (one is a new unit and one was previously a Comet store). A mezzanine floor has been added to the B&Q store since the 2011 GRLSU was carried out.

6.24 Woodbridge road is smaller, containing four units, including two car showrooms, a kitchen store and a Currys/ PC World. These units are generally less well maintained than those in the Ladymead Retail Park. A mezzanine floor has been added to the Curry's/ PC unit since the 2011 GRLSU was carried out.

Table 6.1 Retail Parks Guildford – Diversity of Uses

Shopping Area	Floor Area (m^2)	Ground floor use class	Shop Name 2013
Ladymead Retail Park	1,530	A1	Halfords
	New unit	A1	Vacant - unit being refitted
	528	A3/A5	Burger King
	4,657	A1	B&Q (DIY)
	2,012	A1	Vacant - unit being refitted
	3,850	A1	Homebase (contains Sharps bedroom)
	1,357	A1	Furniture Village
	1,512	A1	Carpet Right and Sleep Right
	985	A1	Argos
	955	A1	Sports Direct
Woodbridge Rd	1,830	A1	Magnet (Kitchens)
	1,306	Sui Generis	H A Fox Jaguar (Car Showroom)
	1,323	Sui Generis	Hunters Landrover (Car Showroom)
	1,742	A1	Currys O PC World
	1,514	N/A	Unit merged with PC world

Source: GBC Survey 2013 and updated by CJ in 2014.

6.25 In 2013 planning consent was granted for a new bulky goods retail unit at Woodbridge Meadows, a neighbouring site. If developed, this would create an additional 2,829m^2 (gross) of retail floorspace.

Foodstores

6.26 The Tesco Superstore at Ashenden Road is located on the western periphery of Guildford town centre. The Council's 2013 survey, which included out-of-centre uses,

recorded a floorspace of 6,056m^2, of which around 35% is devoted to comparison floorspace including the sale of health, beauty and stationary goods. The site visit conducted in July 2014 as part of this study found that store was well stocked and very busy when visited on a weekday afternoon. The car park was over two thirds full. The store has 30 tills in total plus self-service check out tills, of which half were open when visited.

6.27 The Sainsbury's Superstore at Burpham is located north of Guildford town centre. The Council's 2013 survey recorded a floorspace of 7,381m^2. As stated in the 2011 GRLSU, around 40% of the floorspace is devoted to comparison floorspace including the sale of clothing, footwear and household electrical goods. The site visit confirmed that the store was well stocked and relatively busy when visited on a weekday afternoon. The car park was over half full at the time of the site visit. The store has 31 tills in total plus self-service check out tills, of which half were open when visited.

SUMMARY

6.28 The two district centres of Ash and East Horsley are of a similar size, although they each have different strengths and weaknesses to be addressed:

- **Ash has a well maintained shopping environment and a good range of comparison, convenience and service provision. However, there were some vacancies on the outer edges of the parade and there may be an opportunity to broaden the food and drink offer beyond its current focus on take-aways and small cafés. The centre was less busy that East Horsley when visited, and the convenience store was not busy, suggesting a generally lower footfall along this parade.**
- **East Horsley also has an attractive urban environment, and was observed to be well used and busy on the site visit. The centre had no vacancies at the time of this study. There was parking available though most spaces were full at the time of the site visit and the convenience store was busy, suggesting a generally high footfall along this parade. There may be an opportunity to improve parking provision for the parade.**

6.29 The 22 Local Centres represent a broad range of types and scale of provision, therefore general conclusions are difficult to make. However, the provision offered at the largest of the Local Centres, notably Ripley, is such that it is performing a similar role to that of the District Centres. The smaller centres generally served localised needs and are performing well, with few vacancies.

6.30 Out-of-centre retail floorspace is largely contained within Ladymead Retail Park and the Borough's two superstores (Tesco, Ashenden and Sainsbury's, Clay Lane). This indicates that the Council's policies on the town centre approach to new retail development has ensured that development is directed to centre's first.

7.0 ECONOMIC CAPACITY ASSESSMENT

7.1 **This section sets out the assessment of the quantitative need (capacity) for new retail (comparison and convenience goods) floorspace in the Borough area over the development plan period, from 2014 up to 2033. This assessment updates the previous retail capacity studies prepared for the Council.**

CAPACITY APPROACH

7.2 **In simple terms the quantitative capacity for new retail floorspace is generally derived from the forecast growth in population and expenditure, after making an allowance for new commitments[32], and the increased 'productivity' (or 'efficiency') of all existing and new floorspace. Capacity can also occur where there is a clearly identified "*imbalance*" between the 'benchmark' turnover of existing facilities and the current level of expenditure/turnover in a centre store or area[33]. This is often referred to as 'under-trading' or 'over-trading'.**

7.3 **The CREAT^e model has been specifically developed by Carter Jonas over a number of years to inform the forecasts of the <u>turnover</u> and <u>impact</u> of new retail floorspace, as well as the <u>capacity</u> for different types of comparison and convenience goods floorspace, and the impact of new floorspace on the market shares and turnover performance of existing centres, stores and shopping facilities. For this study, the CREATe model is used to assess the capacity for, and impact of new retail (convenience and comparison goods) development and investment in the Borough over the forecast period (up to 2033) The (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested, in accordance with good practice advice. The model draws on the market share analysis derived from the household telephone interview survey to help identify shopping patterns and expenditure flows across the defined study area. In turn this helps to inform the assessment of the current turnovers and trading performance of existing centres, shops and stores at the base year.**

7.4 **The baseline assumptions and forecasts underpinning the CREAT^e model are based on robust evidence, research and best practice. For example, the average retail (convenience and comparison goods) expenditure per capita levels are derived from the latest** *Retail Planner Reports* **produced by Experian (please note all expenditure and turnover figures are expressed in 2013 prices). The forecasts of expenditure growth and 'non-store' retail sales (otherwise referred to as Special Forms of**

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[32] Commitments include retail floorspace with planning permission, under construction and/or opened after the household survey was conducted.

[33] For example where there is clear evidence of significant 'leakage' of shoppers and retail expenditure from defined catchment areas to less convenient and sustainable shopping destinations and/or where there is evidence that existing centres/stores are significantly over-trading based on a range of quantitative and qualitative indicators (e.g. where stores are congested and over-crowded throughout the shopping week).

Trading)[34] **have also been informed by Experian's latest** *Retail Planner Briefing Note 12.1* **(October 2014).**

7.5 Similarly, we have referred to Experian's forecasts for assessing the productivity of existing floorspace, which directly influences the capacity for new floorspace. As highlighted in Section 3 of this report, the most recent data from Experian show a marked increase in the productivity growth[35] **of comparison floorspace in 2014 (+5.4%) and 2015 (+3.8%). This reflects the growth of comparison goods expenditure over this period and a lack of new comparison goods floorspace to absorb this growth; requiring retailers to maximise the use of existing floorspace. This is evident in Guildford, where there has been little retail floorspace development in the town centre over the years. Beyond 2016, productivity growth for existing comparison retail floorspace will slow to 2% to 2.2% over the rest of the plan period reflecting a slowdown in comparison goods expenditure and an improvement in floorspace supply. In contrast, Experian forecast negative productivity growth for convenience floorspace reflecting considerably slower expenditure growth and an over-supply of convenience floorspace, linked to under-performing superstore formats. As highlighted in Section 3, productivity growth**[35] **for convenience floorspace currently is negative (-1.4%) for 2014; with growth improving in 2015 (-0.3%) but remaining negative until the longer term (2022 to 2033) when annual growth increases to 0.1%.**

7.6 For the purpose of this Borough-wide retail ('baseline') capacity assessment, baseline population projections have been estimated using the most up to date 2012-based Sub-National Population Projections (SNPP) for Local Authority areas released by the Office of National Statistics (ONS) in May 2014.

7.7 The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREAT*e* Model are described in more detail below. However, it should be noted at the outset that capacity forecasts carried out over a long period of time are inherently less certain and should be treated with caution. This is principally due to the impact of economic, demographic and market trends on the key assumptions and forecasts. As a result we advise the Council that greater weight should be placed on the short term forecasts carried out over a three-five year period in accordance with the NPPG, although account should also necessarily be taken of the forecast growth over the development plan period.

'BASELINE' ASSUMPTIONS & FORECASTS

7.8 The 'baseline' capacity tabulations for convenience goods and comparison goods are set out in Appendix 10 and in Appendix 11 respectively. As described above, the capacity forecasts are based on the population growth projections from ONS. The

[34] SFT is made up of purchases that generally occur outside of shops such as, for example, via mail order, vending machines, telephone sales, market stalls and the Internet.

[35] Growth in the productivity of retail sales density; including changes to floorspace.

following describes the key steps and assumptions underpinning the retail capacity assessment.

Population and Household Projections

7.9 The population for the study area is estimated to be 635,162 in 2014 (see Table 1, Appendices 6 and 7). The population is projected to increase to 715,405 by 2033, which represents a total growth of +12.6% (+80,243 people) over the forecast period. For Zone 1, which broadly corresponds to the Guildford Borough boundary, the population is estimated at 114,837 and is forecast to increase to 130,729 by 2033; equating to a growth of 13.8% (+15,892).

Expenditure Per Capita and Special Forms of Trading (SFT)

Average Expenditure and Special Forms of Trading

7.10 Table 2 sets out the average expenditure per capita estimates for both convenience goods (Appendix 10) and comparison goods (Appendix 11) in 2014 (2013 prices) for each of the eight study zones. The base year average expenditure figures have been derived from our in-house Experian MMG3 Geographic Information System (GIS).

7.11 An allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year and over the forecast period. This is a standard approach for retail assessments and is based on good practice. As described in Section 3, Experian's latest *Retail Planner Briefing Note* 12.1 (October 2014) indicates that non-store comparison goods sales are forecast to increase from 15.6% in 2014 to 20.5% by 2032/33, and convenience goods non-store sales are forecast to rise from 8.5% to 19.4% over the same period.

7.12 Notwithstanding Experian's research and forecasts, Section 3 also highlighted that there is some debate between economic forecasters as to the likely growth in SFT and specifically internet shopping over the long term, and impact on the capacity/demand for new retail (physical) floorspace. It is Experian's judgement, for example, that the overall impact on traditional store-based shopping will be "*tempered*" by the fact that a proportion of online sales are sourced from regular stores rather than dedicated warehouses. Furthermore, Experian state that store-based expenditure per capita is still forecast to increase, even if this growth is "*outpaced*" by non-store retailing. The assumption therefore is that internet shopping and traditional store-based shopping could be mutually beneficial. This is illustrated by the growth of *'click and collect'* and '*multi-channel'* retailing, where shopping via the internet is driving the demand for traditional ('physical') outlets and showrooms.

7.13 In this context we have referred to Experian's 'adjusted' SFT forecasts which assume that some 25% of SFT comparison goods sales and 70% of convenience goods sales will continue to be sourced from traditional ('physical') retail space. Based on Experian's national forecasts and other research we have made a robust allowance for the growth in SFT for comparison goods from 11.7% to 15.4% between 2014 and 2033, and from 2.6% to 5.8% for convenience goods over the same period.

7.14 However it should be noted that the forecast growth in SFT may be a conservative assumption, as the growth in internet-based retailing could be stronger in more affluent areas (such as Guildford) than the national average. If the growth in internet shopping is stronger than forecast by Experian, and a smaller proportion of online retail sales are sourced from existing shops, then this will reduce the total retail expenditure capacity available to support existing and new retail floorspace in the Borough area. We therefore advise the Council to regularly monitor the research and update the forecast growth rates when necessary.

Expenditure Growth Forecasts

7.15 The growth in average expenditure per capita levels up to 2033 has been informed by the forecasts set out in Figure 1a of Experian's *Retail Planner Brief Note 12.1* (October 2014). As described in more detail in Section 3, Experian's forecasts show negative to limited growth in convenience goods expenditure over the short term up to 2016, with growth thereafter averaging +0.6% per annum. For comparison goods there is stronger forecast annual growth over the short term of +5.6% in 2014, reflecting renewed consumer confidence and pent up consumer demand as the economy improves. However, comparison growth rates are expected to slow to +3.1% in 2016; with average long term forecast growth increasing to circa +3.3% per annum up to 2033.

Total Available Expenditure

7.16 Total available retail expenditure in the study area and zones is derived by multiplying the population and average expenditure per capita levels together.

7.17 As Table 3 (Appendix 10) shows, total available convenience goods expenditure in the study area is forecast to increase from £1,388.0m in 2014 to £1,689.1m by 2033, which is equivalent to a total growth of +£301.1m (+21.7%). Table 3 also shows that expenditure growth in Zone 1 (which broadly corresponds to the Borough boundary) is higher at 23.0%.

7.18 Comparison goods expenditure is forecast to increase from £2,187.2m to £4,369.8m in the study area between 2014 and 2033 (Table 3, Appendix 11). This represents a substantial growth of +£2,182.7m (+99.8%) over the forecast period. As for convenience goods, growth in Zone 1 is higher at 101.9%.

7.19 The forecasts show that the growth in comparison goods expenditure significantly outstrips convenience goods expenditure. All things being equal, this means that there will be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods; assuming no changes in the key forecasts (i.e. expenditure, population and special forms of trading).

Market Share Analysis

7.20 Section 4 described the headline results of the survey-derived (%) market share analysis based on the detailed tabulations in Appendix 8 for convenience goods and Appendix 9 for comparison goods.

7.21 The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the study area and zones to the identified centres, stores and floorspace based on the survey-derived market shares (%). This helps to establish the 'baseline' (2014) trading performance of the Borough's main centres and stores drawn from the study area as well as centres outside the study area.

7.22 For both convenience and comparison goods the 'baseline' turnovers are projected forward to 2019, 2024, 2029, 2031, and 2033 assuming no changes in market shares. Although this is a standard approach widely used and accepted for strategic retail assessments, it does not take account of the likely impact of new retail investment and development on existing shopping patterns and market shares over time.

7.23 The following briefly reviews the turnover of the Borough's main centres and stores within the study area in 2014 based on the market share analysis.

Convenience Goods

7.24 Tables 4 and 5 (Appendix 10) show that Guildford's food stores and convenience shops are currently retaining £200.3m (14.4%) of the total available expenditure of £1,388.0m in the study area as a whole (i.e. Zones 1 to 8).

7.25 The analysis confirms that convenience expenditure in Guildford Town Centre is relatively low, with stores retaining just £36.7m (2.6%) of convenience expenditure in the study area.

7.26 Out of centre stores, including Sainsbury's Clay Lane and Tesco Ashenden Road account for £103.2m (7.4%) of all expenditure in the study area.

7.27 Looking at individual stores, Tesco Ashenden Road is achieving the strongest trading performance with a study area market share of £60.4m (4.4%). The next best performing stores are Sainsbury's at Clay Lane with a £42.8m (3.1%) market share, followed by Sainsbury's in Guildford Town Centre (£19.4m / 6.3%).

7.28 Individually, the District and Local Centres command a much smaller market share, which reflects their primary roles serving the more frequent top-up shopping needs of their local catchment populations. The Borough's two District Centres, East Horsley and Ash, together attract £10.9m (0.8%) of total study area expenditure, which is mainly attributed to expenditure from Zones 1b and Zone 7 (for Ash District only).

7.29 The forecast growth in the market shares (£ million) of the Borough's main stores are set out in Tables 6 to 9 of Appendix 10. At this point in the analysis the tables exclude any potential "inflow" from outside the study area, which is discussed later in this section.

Comparison Goods

7.30 Tables 4 and 5 (Appendix 11) show that all the Borough's centres and shops are retaining some £758.0m (34.7%) of the total comparison goods expenditure in the study area in 2014.

7.31 As expected, Guildford Town Centre is the Borough's main comparison goods shopping destination with a market share of £634.2m (29%) of total study area expenditure. The Borough's District and Local Centres are achieving a market share of less than 1%. This reflects the fact that these centres have limited comparison retail offer, in line with their role and function in the shopping hierarchy.

7.32 Out of centre stores in the Borough (including stores at Ladymead Retail Park, Woodbridge Road and the Tesco and Sainsbury's superstores) together account for £109.0m (5.0%) of total study area comparison expenditure in 2014.

7.33 Looking beyond the Borough, Woking has a market share of £326.6 (14.9%). It has a strong penetration in Zone 3, which broadly correlates to the centre's primary catchment area.

7.34 Outside the study area, comparison expenditure market share is smaller at £214.5m (9.8%). Kingston-upon-Thames attracts the largest proportion of comparison expenditure in the study area at £116.0m (5.3%) followed by Farnborough at £83.1m (3.8%).

7.35 Tables 6 to 10 (Appendix 11) set out the forecast increase in the expenditure (£ million) allocated to the Borough's key shopping locations and stores based on constant market shares up to 2033. At this stage this excludes any potential "inflow" from outside the study area.

'Inflow' and Current Turnover Estimates

7.36 In order to provide a complete picture of the current trading (turnover) performance of the Borough's main centres and stores we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the study area.

7.37 In the absence of detailed turnover and trade draw information for the Borough's centres and stores, our judgements have been informed by previous studies and retail assessments, as well as the survey, health check evidence and tourist data. The '*inflow*' assumptions also take account of the scale, offer and location of all existing centres and stores in the Borough; the likely extent of their catchment areas; and the likely expenditure derived from commuters working in the Borough but living outside the study area.

7.38 Although the assessment of 'inflow' is not a straight-forward exercise due to the complex nature of overlapping catchments and shopping patterns in London and urban areas generally, it is reasonable to assume that Guildford Town Centre and easily accessible out of centre stores will attract shoppers and trade from outside the study area – known as 'inflow'. In contrast those stores in the smaller district and local centres will draw the majority of their shoppers and trade from more local catchments, with limited or no '*inflow*' from outside the study area.

7.39 For convenience expenditure, we have assumed an 'inflow' of 10% for Guildford Town Centre alone, which reflects its strong commuter and visitor draw. For the same reason, we have also estimated comparison expenditure 'inflow' also at 10% for Guildford Town Centre, as well as a 5% inflow to out-of-centre retail stores and parks. This is on the basis that these retail parks are visible from key transport routes and are likely to attract passing trade from visitors travelling through the study area.

7.40 Table 11 (Appendix 10 and 11) set out the revised convenience and comparison goods turnover estimates for all the main centres and stores in Guildford Borough based on the (survey-derived) market analysis and the 'inflow' assumptions.

RETAIL COMMITMENTS

7.41 In terms of retail commitments in Guildford Borough, Table 12 (Appendix 10) and Table 12 (Appendix 11) identify food and non-food retail floorspace with planning permission at the time of preparing this assessment.

7.42 The following provides a brief summary of the main floorspace commitments based on information provided by Guildford Borough Council and the evidence submitted in support of the planning applications:

- **Waitrose, York Road, Guildford Town Centre** (LPA reference: 12/P/01020) - Planning permission was granted in December 2012 for a 3,485m^2 gross floorspace Waitrose foodstore. The net sales area extends to 1,951m^2 of which 85% is for the sale of convenience goods and the remainder for comparison goods. The foodstore forms part of a wider mixed use development that includes housing and replacement community facilities. The total turnover of the foodstore is estimated at £21.0m in 2014.

- **Aldi, London Road, Burpham** (LPA reference: 13/P/0208) – Planning permission was granted in February 2014 for the redevelopment of the Green Man public house site, London Road for a 1,380m^2 gross floorspace foodstore. On completion, the foodstore will be occupied by Aldi. The net sales area is 972m^2. Typically discount retailers such as Aldi and Lidl comprise a retail sale breakdown of 80% for the sale of convenience goods with the remaining 20% for comparison goods. These ratios have been applied as part of this assessment. The total turnover of the Aldi foodstore is estimated at £7.2m.

- **Convenience store, 120 Ash Street, near Wharf Road, Ash District Centre (LPA reference: 12/P/01947) – Planning permission was granted for a small convenience store in Ash District Centre in January 2013. The planned convenience store includes a gross floor area of 372m^2. The turnover of the convenience store is estimated at £1.6m assuming the store is operated by a national convenience store operator (e.g. Spar, Nisa, etc.).**
- **5 Woodbridge Meadows, Guildford (LPA reference: 13/P/01318) - Planning permission was granted in December 2013 for the redevelopment of a storage unit to create A1 retail floorspace extending to 3,064m^2 gross floorspace. The site is located out of centre and is conditioned for bulky goods retailing. The turnover of the planned store is estimated at £7.8m, based on an average sales density of £3,000 per m^2 for bulky goods comparison floorspace.**
- **10 Sydenham Road, Guildford (LPA reference: 12/P/01502) – Planning permission was granted in February 2013 for the redevelopment of the former Basketworks site at 10 Sydenham Road. The planned development includes permission for 343m^2 retail floorspace (gross). It is assumed for this assessment that the unit will be occupied by a comparison goods retailer equating to an estimated turnover of £1.7m in 2014, based on an average sales density of £5,000 per m^2.**
- **The Vineries, Lower Road, Effingham (LPA reference 13/P/01290) - Planning permission was granted in April 2014 for the change of use from a nursery and retail garden centre to a garden centre retail use. The scheme will create a total gross floor area of 5,240m^2. We have assumed that the net sales are accounts for 80% of the total gross floor to reflect the fact that garden centres typically require less stock storage space. We have also assumed a sales density of £1,000m^2 which reflects sales densities for garden centre retailers, as identified by Mintel Retail Rankings (2012/13) and similar schemes elsewhere. The results in a turnover of £5.2m in 2014.**
- **Racing Green, Lysons Avenue, Ash Vale (LPA reference 14/P/01579) - Planning permission was granted in October 2014 for the change of use of existing showrooms and workshops, formerly occupied by Racing Green, to provide an A1 retail unit for a furniture retailer (Darlings of Chelsea). The proposed store has a gross floor area of the store is 967m^2, gross; equating to a sales area of 677m^2 (assuming 70% of gross). We have assumed that the store will achieve a sales density of £2,500 per m^2 in 2014, which reflects similar sales densities for furniture retailers identified by Mintel Retail Rankings (2012/13) and similar schemes elsewhere. The results in a turnover of £2.6m in 2014.**

7.43 The above commitments and estimated turnover for each scheme has been incorporated into the later stages of the economic capacity analysis.

7.44 It should be noted that the 2011 GRLSU included committed floorspace associated with an extant permission to extend the Friary Centre on adjoining land now known as the North Street regeneration site. This permission is soon to expire unimplemented (October 2015), in part due to the replacement bus station which is part of permission. It has therefore not been included as a commitment in this study update. As previously discussed in Section 5, proposals are now coming forward for the North Street development site which is likely to provide circa 43,000m^2 (gross) of retail, food and drink and leisure floorspace including a new anchor store, alongside residential accommodation. Although this site does not include the existing Friary Shopping Centre (as the planning permission did) it should be noted that this does not take account of existing floorspace that will be demolished to accommodate the new development. However, there is not a significant amount of retail floorspace on the North Street regeneration site, most being along the North Street frontage. A development agreement between Guildford Borough Council and Land Securities was recently terminated, and discussions will continue with the other key landowner of the site, M&G Real Estate.

'BASELINE' CAPACITY: BOROUGH-WIDE FORECASTS

7.45 The 'baseline' capacity forecasts for both convenience and comparison goods draw on the 2012-based Sub-National Population Projections for local authority areas in England released by the Office of National Statistics (ONS) in May 2014.

7.46 We have first assessed the Borough-wide ('global') capacity for new retail floorspace over the development plan period. Later in this section we provide a more detailed breakdown of capacity for each of the Borough's main centres; focusing on Guildford Town Centre, and Wharf Road, Ash and Station Parade, East Horsley District Centres. The capacity forecasts will enable Guildford Borough Council to test the strategic options for the spatial distribution of new retail-led development over the plan period and make informed policy choices about where any forecast capacity should be met. This will clearly depend on a whole range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres.

7.47 It has been assumed for the purpose of the Borough-wide capacity assessment that the Borough's convenience and comparison goods retail market is in '*equilibrium*' at 2014. We consider that this is a reasonable and robust baseline position based on the survey and health check evidence, the findings of the detailed market share analysis, and the fact that new retail (convenience and comparison goods) floorspace is scheduled to open in the Borough over the next five years.

7.48 Assuming '*equilibrium'* at the base year, the forecast residual expenditure capacity within the study area up to 2033 is derived from the differences between the forecast growth in turnover levels, based on applying the constant (survey-derived) market shares to the total growth in available expenditure; and an allowance for the growth in 'productivity' ('efficiency') in existing and new retail floorspace in accordance with policy and good practice. As explained in Section 3, we have assumed an annual average 'productivity' growth rate of between -1.4% to 0.1% for convenience goods floorspace and between 2% and 5.3% for comparison goods floorspace over the forecast period (2014 to 2033).

7.49 It should be noted at the outset when interpreting the capacity forecasts that the Borough-wide assessment is based on a standard constant market share approach. It does not therefore take account of any potential uplift in market shares and capacity that could occur within catchment areas due to the 'claw back' of expenditure to new retail floorspace in more convenient and sustainable town centre locations. For example, the opening of a Waitrose store in Guildford Town Centre will improve the centre's convenience retail market shares by some degree. Should the delivery of a new anchor store as part of the North Street scheme be achieved, it would increase the overall attraction, quality and critical mass of the town centre's retail and leisure offer. It is therefore likely that it will increase the town's market share over time through the 'claw back' of shopper expenditure from competing centres and shopping facilities. We therefore consider that it will also increase the capacity for new retail floorspace over time.

Convenience Goods 'Baseline' Capacity

7.50 Table 13 (Appendix 10) sets out and explains the key steps underpinning the convenience goods capacity assessment based on Guildford Borough's population projections.

7.51 In order to convert the residual expenditure into a net sales figure we have assumed superstore format floorspace will achieve an average sales density of circa £12,250 per m^2 in 2014. This is broadly based on the average sales performance of the main foodstore operators (i.e. Tesco, Sainsbury's, Asda, Morrisons, M&S Food, Waitrose, etc.).

7.52 The 'baseline' expenditure and floorspace capacity forecasts are summarised in the table below.

Table 7.1 Borough-wide Capacity – Assuming 'Equilibrium' at 2014

	2019	2024	2029	2031	2033
Residual Expenditure (£m):	-£12.1	£0.1	£12.2	£16.6	£21.1
Floorspace Capacity (m^2 net):	-999	11	1,005	1,366	1,734

Source: Table 13, Appendix 10.

7.53 Table 7.1 above shows that when assuming 'equilibrium' at the base year there is limited quantitative capacity for new convenience goods floorspace in the Borough in the short to medium term (up to 2024). However, capacity emerges for 1,005m^2 in 2029; increasing to 1,734m^2 net by 2033.

7.54 The capacity results reflect the strong provision of existing convenience retail offer across the Borough and the impact of the foodstore commitments that are scheduled to open within the next five years, which absorb forecast net expenditure in the short term. The findings are in contrast to the results of the 2011 GRLSU, which identified no capacity for new convenience floorspace. The identification of Borough-wide capacity for convenience floorspace in the 2014 assessment may be linked to improved convenience expenditure levels in the Borough and an increase in net expenditure associated with new foodstore developments in the Borough since 2011.

7.55 We have also assessed the capacity generated by Guildford Town Centre, and Ash and East Horsley District Centres based on their trading performance at the base year (i.e. 'potential' and 'benchmark' turnovers). The results are set out in Tables 14-16 (Appendix 10) and summarised below.

Table 7.2 Guildford Borough's Centres – Convenience Floorspace Capacity Forecasts

	2019	2024	2029	2031	2033
RESIDUAL EXPENDITURE (£m):					
Guildford Town Centre	-£15.9	-£13.5	-£11.2	-£10.4	-£9.5
Ash District Centre	-£1.3	-£1.1	-£0.8	-£0.8	-£0.7
East Horsley District Centre	£0.5	£0.9	£1.3	£1.4	£1.6
FLOORSPACE CAPACITY (m^2 net):					
Guildford Town Centre	-1,318	-1,119	-924	-853	-780
Wharf Road, Ash District Centre	-106	-87	-70	-63	-56
Station Parade, East Horsley District Centre	41	73	105	117	129

Source: Tables 14, 15 & 16, Appendix 10 (Steps 5 & 6)

7.56 The table confirms that there is no floorspace capacity in Guildford Town Centre once all committed convenience floorspace is taken into account. For the Borough's two District Centres, forecast convenience floorspace is only identified for Station Parade, East Horsley; this would possibly support an extension to an existing store or a new small format convenience store.

7.57 The capacity assessment identifies residual forecast capacity for the Borough; including local centres, as well as edge and out of centre locations. As the table below shows, after discounting forecast capacity for Guildford Town Centre and the two District Centres, there is forecast capacity for up to 4,984m^2 (net) of new convenience by 2033. This identified capacity is largely driven by residual expenditure associated with the Borough's two out of centre superstores. Given that national policy promotes the town centre approach to new town centre uses, this convenience floorspace capacity should be used to support new retail development in line with the NPPF's

sequential test. In this case, this any surplus retail capacity in Borough should be directed to Guildford and the District Centres in the first instance, followed by the Borough's local centres (subject to market demand).

Table 7.3 Summary of Forecast Convenience Goods Capacity (m^2 net)

	2019	2024	2029	2031	2033
Guildford Town Centre	-1,318	-1,119	-924	-853	-780
Ash District Centre	-106	-87	-70	-63	-56
East Horsley District Centre	41	73	105	117	129
Rest of Borough	384	1,145	1,893	2,165	2,441
TOTAL BOROUGH	-999	11	1,005	1,366	1,734

Source: Tables 14 to 17, Appendix 10.

Scenario Testing: Changes in Market Shares

7.58 The opening of a new Waitrose store on York Road in Guildford Town Centre is likely to increase the town centre's market share through the diversion of expenditure from the Borough's two out-of-centre superstores (Tesco Ashenden and Sainsbury's Clay Lane) and other foodstores in the Borough. It is unlikely that the new store alone will impact on food shopping patterns outside the Borough and result in any notable claw back of leaked expenditure as shoppers will continue to shop locally. Therefore, while Guildford Town Centre may result in an up-lift in market share associated with the new Waitrose, this will be through the redistribution of expenditure in the Borough rather than an increase in the Borough's market share/ retention. Notwithstanding this, the potential delivery of a new anchor department store as part of the proposals for the North Street regeneration site may increase the Borough's convenience expenditure market share/ retention through linked trips with the new store.

Scenario Testing: Capacity based on 'Overtrading'

7.59 We note that the previous study considered the potential for convenience capacity based on surplus expenditure from over-trading stores. This equates to the difference in turnover from survey-derived turnover and 'benchmark' turnover. For example, the economic assessment indicates that Tesco, Ashenden Road is overtrading by £35.4m, and Sainsbury's and Tesco Express in Guildford Town Centre are overtrading by £9.2m and £3.6m respectively.

7.60 Table 19 (Appendix 10) assesses the potential to support new convenience floorspace through surplus expenditure from over-trading stores in the Borough. This approach indicates potential to support floorspace for a new foodstore from the base year (2014) turnover resulting in a forecast capacity of 5,098m^2 (net sales) in 2019; increasing to 7,103m^2 by 2029 and 7,831m^2 by 2033.

7.61 However, the use of expenditure from overtrading to support new floorspace should be treated with caution. The application of company averages to stores in Guildford is unlikely to representative, as they are likely to experience higher than average benchmark turnover based on the demographic and socio-economic profile of the Borough and Zone 1. As Section 4 highlighted, Zone 1 (combined sub-zones) and wider study area has an affluent customer base.

7.62 In addition, the use of over-trading also masks stores that are under-performing. For example, the assessment indicates that the Sainsbury's superstore at Clay Lane is under-performing by -£0.3m along with stores in the town centre including the Marks & Spencer Food Hall (-£6.7m) and Morrison's Local (-£1.3m). Given that benchmark turnover for these stores is likely to be above company averages, it is possible that these stores are under-performing at a greater level. For these reasons the use of overtrading to support the capacity for new convenience floorspace it should be treated with extreme caution.

Convenience Floorspace for Strategic Housing growth areas

7.63 Despite the lack of global capacity to support new convenience retail provision in the Borough, consideration has also been given to future strategic housing growth areas and the need to ensure local facilities are in place.

7.64 The emerging new Local Plan proposes four strategic housing sites, namely: Blackwell Farm; Gosden Hill Farm; Slyfield Area Regeneration Project; and the former Wisley airfield. The largest of the strategic housing sites is Blackwell Farm with 2,600 homes proposed and the potential to accommodate a population of approximately 5,500 as shown in the table below.

7.65 In addition, we have also considered the need to improve convenience provision for the wider Ash and Tongham area where approximately 1,215 homes across a number of sites are proposed under the draft new Local Plan. This will support a population of almost 2,952 in the area.

Table 7.4 Planned Strategic Housing Growth Sites / Area Population Estimate

Strategic Housing Site / Area	Housing Capacity	Estimated Population
Blackwell Farm	2,250	5,468
Gosden Hill Farm	2,000	4,860
Slyfield Area Regeneration Project	1,000	2,430
Former Wisley Airfield	2,100	5,103
Ash and Tongham	1,215	2,952

Source: Guildford Borough Council

Notes: Estimated population is based on an average household size of 2.43 persons.

7.66 The majority of sites identified in the above table are located on greenfield land and in most cases are some distance from existing local facilities. Under the NPPF, the Council is obliged to ensure that new communities promote sustainability and provide easy access to local facilities, including retail (paragraph 23, NPPF). Therefore, some level of local convenience provision is required to meet the day to day needs of the local population. For convenience retail, the primarily relates to top-up shopping provision.

7.67 The need for main food shopping facilities for the planned strategic housing areas will depend on the availability of foodstores in the area and whether the strategic sites fall within reasonable catchment for those existing stores. To assess this, we have analysed the catchments of superstore and foodstore facilities in the Borough. A geographical illustration of existing facilities and corresponding catchments are provided in a catchment analysis plan in Appendix 13. The catchments are based on 5 minute and 10 minute drive time isochrones for supermarkets and superstores, respectively. Local convenience facilities (namely national convenience chains) are also plotted, with corresponding catchments based on an 800 metre walking radius from the store.

7.68 The catchment analysis plan shows that the shopping catchment for the Borough's two food superstores includes Blackwell Farm, Gosden Hill Farm and Slyfield. The former Wisley airfield site sits just outside the 10 minute drive-time catchment for Sainsbury's Clay Lane and is included in the catchment for foodstores in Cobham. Given the rural nature of the area, which is largely unpopulated, we do not consider there is sufficient demand, even with future housing, to support a larger format foodstore within the former Wisley airfield site.

7.69 For Ash and Tongham, the area falls outside the catchments of the Borough's existing superstores, but falls within the catchment for superstores in neighbouring Rushmoor District Council. This is reflected in the convenience market shares for Zone 7 (includes Ash and Tongham), which confirms that only 7.4% expenditure is retained in the Borough (6.4% in Ash and Tongham). In contrast, the greatest proportion of expenditure is retained by foodstores in Aldershot (40.1%) and Farnham (34.5%). While Ash and Tongham fall within a wider geographical area that comprises Zone 7, the considerably low retention of expenditure in the Borough suggests that residents from Ash and Tongham are more likely to carry out foodstore shopping in Rushmoor District than in Guildford Borough.

7.70 Looking at smaller foodstore facilities in the Borough, the catchment analysis plan also shows that the four strategic housing sites and areas that comprise Ash and Tongham are not served by local catchments for smaller foodstores and local convenience operators.

7.71 An indicative quantitative assessment was then carried out, which examined the potential convenience expenditure generated from the future population associated with housing population identified in Table 7.4. This has been quantified based on an average expenditure per capita (excluding SFT) for the Borough area (£1,920 in 2014). Consideration is also taken of existing convenience provision in the area, which is expected to attract expenditure from the planned strategic housing sites/ areas. It is assumed that 50% of available expenditure from the four strategic housing sites (Blackwell Farm, Gosden Hill Farm, SARP and Slyfield) will be drawn to existing foodstores in the area. For Ash and Tongahm, it is assumed that there is potential to retain a higher proportion of expenditure (75%) based on the potential to claw back expenditure leaked to foodstores in Rushmoor District. The indicative need for convenience floorspace across the planned strategic housing areas is set out below for the end of the forecast period (i.e. up to 2033).

Table 7.5 Indicative Convenience Floorspace Need for Planned Strategic Housing Growth Areas in 2033

	Available Expenditure (£m)	Retained Expenditure		Potential Forecast Net Sales Floorspace (m^2)	
		(%)	£m	Foodstore/ Local Format	Convenience / Deep Discount
Blackwell Farm	£11.4	50%	£5.7	466	951
Gosden Hill Farm	£10.1	50%	£5.0	414	845
Slyfield Area Regeneration Project	£5.0	50%	£2.5	207	423
Former Wisley Airfield	£10.6	50%	£5.3	435	888
Ash and Tongham	£6.1	75%	£4.6	377	770

Sales density for foodstore/ local format foodstore based on the average for the UK's major grocery operators (£12,250 per m^2). For local convenience and deep discount format floorspace we have assumed an average sales density of £6,000 per m^2.
Net floorspace assumed at 70% of gross floorspace.
Available expenditure based on average convenience expenditure per head (excluding Special Forms of Trading) for Guildford Borough in 2014 (£2,087) and projected to 2033 using annual expenditure growth derived from Experian Business Strategies Retail Planner Briefing Note 12 (October 2014); Table 2, Appendix 10.

7.72 Taking account of the above, we consider that there is a potential qualitative and quantitative need for a 'local' format foodstore (e.g. Tesco Express, Sainsbury's Local, Little Waitrose, etc.) in each of the four strategic housing sites at Blackwell Farm, Gosden Hill Farm, SARP and the former Wisley airfield. Alternatively, based on a lower sales density there is potential to support a large convenience store (e.g. Co-op, Budgens, etc.). For Blackwell Farm or Gosden Hill Farm there is potential to support a smaller format deep discount foodstore (e.g. Aldi, Lidl, Netto, etc.).

7.73 The opportunity for new convenience provision at the strategic housing sites would ensure that local top-up convenience shopping provision is met and reduces the distance to travel for future residents to access their top-up and some of their main food shopping needs. Any future proposals for local convenience food retailing should be incorporated as part of the local centre serving the strategic housing site. In addition, any proposed provision should be limited to serving a local catchment and must not impact on the vitality and viability of other centres.

7.74 For Ash and Tongham, there could be a potential opportunity to support a local format foodstore (e.g. Tesco Express, Sainsbury's Local, Little Waitrose, etc.). Alternatively there is potential capacity to support a deep discount foodstore (e.g. Aldi, Lidl, Netto, etc.). It is noted that there is no main foodstore serving the Ash and Tongham area. As such there is a qualitative need for a foodstore to serve the wider area and help claw back leaked convenience expenditure to key foodstores in Aldershot and Farnham. The delivery of a foodstore should be aligned to future housing proposals in Ash and Tongham and should be targeted at meeting the qualitative convenience retail deficiency of these centres only. Any application for a foodstore as part of new housing in this area should demonstrate that it will not have a significant adverse impact on Ash and Tongham; particularly in relation to the impact on existing convenience operators in Wharf Road District Centre and the Local Centres in the area.

Comparison Goods 'Baseline' Capacity

7.75 Table 13 (Appendix 11) sets out the detailed steps in the comparison goods capacity assessment. The residual expenditure and floorspace capacity forecasts are summarised in the table below. This approach assumes 'equilibrium' at the base year and constant market shares over the forecast period, and allows for all comparison goods retail commitments (identified in Table 12, Appendix 11).

Table 7.6 Cumulative Borough-Wide Comparison Capacity – Assuming 'Equilibrium' at 2014 (m^2 net sales)

	2019	2024	2029	2031	2033
Residual Expenditure (£m):	£18.0	£109.0	£240.8	£303.9	£370.9
Floorspace Capacity (m^2 net):	3,044	16,586	32,868	39,723	46,409

Source: Table 13, Appendix 11 (Steps 10 & 11)

7.76 As the table shows, there is forecast capacity for 3,044m^2 of new comparison goods floorspace in the Borough over the next five years, up to 2019. By 2029, forecast capacity significantly increases to 32,868m^2 net of new comparison goods floorspace. These forecasts take account of all the committed floorspace in the Borough including all schemes identified in Table 12 (Appendix 11). Forecast capacity further increases in the longer term to 39,723m^2 net of new comparison goods floorspace in 2029 and to 46,409m^2 by 2033. The net floorspace capacity results are lower than comparable forecasts identified in Table 8 (Appendix 3) of the 2011 GRLSU, which excluded the North Street development as a commitment with planning permission at the time (e.g. 27,167m^2 net by 2021 and 55,005m^2 net by 2026). The reduction in capacity for this latest capacity assessment is likely to be linked to lower growth in comparison goods expenditure and higher efficiency/ productivity of comparison goods floorspace.

7.77 It should be noted that the forecast expenditure 'surplus' has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £5,000 per m^2. This is broadly equivalent to the average sales

density of new comparison goods floorspace trading in prime shopping locations. Notwithstanding this assumption, average sales levels will vary depending on a range of factors[36]. The Council should be aware that these different sales levels assumptions will have implications for the assessment of the need for, and impact of different types of comparison goods retailing. It will also be a material consideration for the local planning authority when assessing and determining applications for large format retailing (such as retail warehouses for example).

Scenario Testing: Potential Changes to Market Shares

7.78 As mentioned previously, the emerging proposals for revised scheme for North Street includes a new anchor store. If the scheme is delivered by 2024 (based on a ten year delivery period), it is likely to meet identified comparison floorspace need for the Borough in full for that period. In addition, it is likely to increase Guildford Town Centre's market share through the claw back of leaked expenditure to competing centres (e.g. Woking and Kingston-upon-Thames) and an increased inflow of expenditure from residents outside the study area. This would in turn increase expenditure capacity in the Borough, in particular for Guildford Town Centre, and as a consequence increase forecast comparison floorspace from 2024 onwards. However, we advise that any potential uplift in market share for Guildford Town Centre and the wider Borough should be addressed in detail as part of a retail assessment in support of a planning application for the North Street regeneration scheme.

Potential Sites for New Retail Floorspace

7.79 The assessment has not assessed capacity for comparison retail floorspace below Borough level on the basis that market demand for floorspace at District and Local level is negligible and the need to direct new comparison retail floorspace to Guildford Town Centre; supporting the centre's role as a regional shopping destination. However, consideration has been given to how retail capacity can be accommodated within Guildford Town Centre and the potential need to include comparison retail as part of the strategic housing growth areas.

7.80 The key issue for the Council is in identifying suitable sites to accommodate the forecast comparison floorspace over the plan period, while taking account of the need to promote a town centre's approach to new retail development.

7.81 A review has been undertaken of proposed sites in the town centre that have the potential to accommodate new retail floorspace. These include sites identified as part of the emerging new Local Plan as well as other potential wind-fall sites. A summary of sites are set out in the table below. This provides an indicative estimation of

[36] This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per m^2, whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per m^2 and above.

comparison floorspace capacity and broad timescale for delivery of future development for each site:

Table 7.7 Review of Potential Sites for Comparison Retail Development

Site	Description	Potential Floorspace (m^2 Gross)	Estimated Delivery (years)
Core Shopping Area			
North Street	Identified for retail and housing in current and emerging Local Plan policy. Ideally located to accommodate retail development, as reflected in emerging proposals for a comparison retail scheme including a new department store.	43,000	5-10
Debenhams	Proposed for mixed use development. However, this will likely lead to the loss of retail floorspace. Subject to availability constraints.	No change	10-15
Dolphin House	Existing use includes retail, restaurants and residential. Promoted in the draft Local Plan for similar uses with the proviso that there is no net reduction in existing residential provision. Prominent location that is ideally suited to accommodate new comparison floorspace.	500 to 1,000	10-15
White Lion Walk and Phoenix Court	Any future refurbishment or redevelopment proposals for both centres should seek to increase comparison retail floorspace. This could include infill development at Phoenix Court and the providing retail accommodation at upper floor level.	1,000 to 5,000	10-15
Edge of Core Shopping Area			
Land & buildings at Guildford railway station	Proposed for mixed use development. Well located to support comparison floorspace whilst maintaining linked trips to the town centre.	2,000 to 5,000	0-5
Portsmouth Road surface car park	Promoted under the draft Local Plan for commercial uses except retail. Potential to include retail floorspace within the use mix.	500 to 1,000	5-10
Land at Bedford Road	Promoted for commercial and/or housing with leisure (restaurants and cafes). Given the site's proximity to the Core Shopping Area, there is potential to support comparison retail floorspace as part of a mixed use development.	500 to 1,000	5-10
Total Potential Floorspace Capacity (m^2 gross)		**47,500 to 56,000**	

7.82 As the table shows, the most obvious site to accommodate new comparison retail floorspace in the short-term is the North Street regeneration site. Originally, a foodstore was included in the previous planning permission for the site. However, given the planned development of the Waitrose store at nearby York Road, there is unlikely to be strong market demand for convenience retail floorspace as part of the North Street development. Instead, the site has the best potential to accommodate new comparison goods floorspace for the town centre. This is reflected in the emerging proposals for the site promoted by Guildford Borough Council. As highlighted previously, the proposals include a new anchor store, which would considerably strengthen Guildford's shopping profile and increase footfall along North Street.

7.83 The proposed refurbishment of the Tunsgate Shopping Centre will also assist in delivering an up-lift in comparison retail floorspace in the short term. Proposals coming forward from Queensbury Development include a first floor extension to the shopping centre and other refurbishment works that would increase retail accommodation by approximately 1,000m^2 (gross). It is intended that the proposed works at Tunsgate will be completed in 2015.

7.84 Other proposals coming forward in the short term include the redevelopment of land and buildings adjacent to Guildford rail station. It is expected that planning permission will be sought for a mixed use scheme, which will include a new foodstore and some comparison retail provision. While no information is available on emerging floorspace proposals for comparison retail for the scheme, it is estimate that the site could support approximately 2,000m^2 to 5,000m^2 (gross).

7.85 The draft Local Plan identifies sites in Guildford Town Centre for mixed use development over the longer term. Consideration should be given to the potential to increase comparison retail offer at these sites; particularly sites within the Primary Shopping Area. These include Dolphin House and Guildford Library, both of which are located in prominent locations that have the potential to support new or enhanced retail floorspace as part of a wider mixed use scheme.

7.86 As highlighted previously, the NPPG requires Local Authorities to ensure that need is met over a 15 year period. However, the NPPG points to the importance of delivering growth over a 3 to 5 year period. The capacity assessment identifies a modest quantum of forecast need for new comparison floorspace in this period, with capacity considerably increasing by 2024. Despite this, a number of key sites are likely to come forward for development in the next five to ten years that will reduce the long term forecast need. In particular, the potential delivery of the North Street regeneration site during this period will absorb a significant quantum of forecast capacity for comparison floorspace. As described above, the scheme also raises the potential to increase Guildford's turnover market share and in turn increase forecast comparison retail need.

7.87 A key challenge for Guildford Borough Council is to ensure forecast need is met by 2033 while ensuring that new retail floorspace is direct to Guildford Town Centre as a priority. The review of sites in Table 7.6 indicates the potential to accommodate the majority of the forecast comparison floorspace need within town centre sites. There is also the potential to direct some of the new comparison floorspace to East Horsley and Ash District Centres and within the proposed new local centres.

7.88 However, it is likely that the Council may need to consider identifying an edge-of or out-of-centre site towards the end of the development plan period to support any residual comparison goods floorspace that cannot reasonably be accommodated in Guildford Town Centre and the Borough's other main centres. This edge or out-of-centre offer would need to complement the retail offer in the town centre and other centres, and it would need to be demonstrated that there are no sequentially preferable sites and it would not have a significant adverse impact on existing centres, in compliance with the NPPF (paragraphs 24-27).

SUMMARY

7.89 This section has assessed the Borough-wide capacity for new (convenience and comparison goods) retail floorspace in the study area over the forecast period.

7.90 As its starting point the Borough-wide strategic capacity assessment has assumed that the Borough's (convenience and comparison goods) retail market is in 'equilibrium' at the base year and held market shares constant over the forecast period.

7.91 Consideration has also been given to the potential uplift in comparison goods market share as a result of emerging proposals for a new anchor store in Guildford Town Centre. The updated capacity forecasts take into account all key retail floorspace commitments in the Guildford Borough at the time of preparing this study.

7.92 The analysis has identified limited capacity for new convenience goods (for either 'superstore format' or 'deep discount format') floorspace in the short term to medium term, However, capacity emerges in the longer term (up to 2033) to support a new small foodstore. Although the 2011 GRLSU identified capacity based on overtrading stores, we do not consider this a robust approach to supporting new floorspace development unless it supports more sustainable floorspace in Guildford Town Centre, the District Centres and new Local Centres. It is apparent from the updated assessment that there is good provision and choice of foodstores in the Borough, albeit, out of centre. This provision has been further strengthened in recent years by the opening and planned opening of small to medium sized foodstores including Morrisons Local in Guildford Town Centre and Waitrose, which is due to open in 2015.

7.93 Furthermore, the assessment identifies the potential qualitative need to provide local convenience retail provision at planned strategic housing growth sites. Based on the housing population for these sites, there is the potential to support a 'local' format foodstore or the larger strategic sites – a small format deep discount foodstore operator. For Ash and Tongham where a number of housing sites are currently coming forward and are planned, there is currently no major foodstore in the Borough serving the area. The results of the household survey identify considerable leakage from the Ash and Tongham to stores in Aldershot and Farnham. As such, we consider that there

is a potential qualitative need to support a new foodstore to serve existing and future residents in the area.

7.94 **For comparison goods retailing there is 'baseline' capacity for 16,586m^2 net of new retail floorspace by 2024, increasing to 32,868m^2 net by 2029 and 46,409m^2 net by 2033. By way of reference the 2011 GRLSU identified a higher 'baseline' capacity of 55,005m^2 net in 2026. This reflects fluctuation of expenditure growth forecasts and changes in floorspace efficiency/ productivity since the last study was produced and the level of identified committed floorspace. However Given Guildford's role as a key shopping centre in the region, the potential need for new floorspace should be directed to Guildford Town Centre. A high level review of sites in Guildford Town Centre indicate the potential to accommodate forecast comparison floorspace; in particular the North Street regeneration site, the rail station redevelopment site and the potential to increase retail opportunities at smaller sites planned for mixed use development. It should be noted that proposals for the North Street scheme have the potential to meet forecast comparison floorspace needs in full in the medium term (2014 to 2024). Opportunities to support new comparison retail floorspace should also be promoted in the District and Local Centres, including planned new Local Centres serving strategic housing sites.**

7.95 **Finally, it is important to restate that longer term capacity forecasts should be treated with caution, as they are based on a variety of assumptions that are likely to be subject to change. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term.**

8.0 LEISURE 'GAP' ASSESSMENT

8.1 Leisure uses can make a significant contribution to a town centre's vitality and viability. A good provision and choice of leisure facilities and uses can help to increase '*dwell times*', footfall and turnover in centres, with significant benefits for both daytime and evening economies.

8.2 However, the commercial leisure sector is highly complex and dynamic, as commercial leisure uses are particularly sensitive to changes in economic, population, lifestyle and fashion trends. As a result, forecasting the growth of this sector and identifying the need for new facilities is more complicated than for retailing. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are less sophisticated than for retailing.

8.3 The NPPF recommends that need assessments for new economic development (which includes leisure uses and floorspace) should take account of both quantitative and qualitative considerations (paragraph 161). In this context our analysis therefore focuses on the following key elements:

- a review of the key trends driving market demand in the leisure sector over the last 10-15 years;
- an audit of current commercial leisure uses in the Borough (both town and out-of-centre) to help identify any potential 'gaps' in provision;
- a review of the results of the household survey to understand current commercial leisure participation rates and preferences across the Borough; and
- a broad economic assessment of the need for new additional leisure facilities across Guildford based on different approaches.

8.4 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that can make a significant contribution to the overall vitality and viability of town centres (i.e. cafés, bars, restaurants, cinemas, healthclubs, bowling alleys, etc.).

LEISURE EXPENDITURE GROWTH

8.5 Like the retail market, the commercial leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the leisure sector has not been immune to the impact of the recent economic downturn, leisure activities remain an important lifestyle choice for many consumers who are prioritising leisure over other areas of spending.

8.6 **Table 8.1 below shows the UK average expenditure per head on commercial leisure services[37] and the average for the defined study area catchment zones based on Experian data. It shows that UK household spending on leisure services is dominated by the restaurant and café category (including pubs). This pattern is broadly repeated across all the zones.**

Table 8.1 Estimates of Spending on Leisure Services in 2013 (£ per head)

Leisure Service	Zone 1a	Zone 1b	Zone 1c	Zone 1 (all)	Zones 2 to 8	Study Area Average	% of Total (Study Area Average)
Accommodation	£191	£165	£205	£187	£178	£185	8.0%
Cultural services	£334	£347	£408	£363	£378	£367	15.9%
Games of chance	£111	£143	£151	£135	£154	£140	6.1%
Hairdressing salons & personal grooming	£120	£119	£141	£127	£129	£127	5.5%
Recreational and sporting services	£160	£157	£207	£175	£178	£176	7.6%
Restaurants, cafes, etc.	£1,331	£1,216	£1,404	£1,317	£1,289	£1,310	56.8%
Total	£2,248	£2,147	£2,517	£2,304	£2,306	£2,304	100.0%

Source: Experian, 2012 prices.

8.7 **The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in** *Retail Planner Briefing Note 12.1* **(October 2014). EBS forecasts show negative to nil annual growth between 2012 to 2013, with stronger growth forecast in the short term (2014-2015) before stabilising over the longer term (from 2017) to between +1.1% and 1.3% per annum. This forecast growth is higher than annual average historic growth rates for the period 1983-2013, which showed no growth.**

Table 8.2 Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2012	2013	2014	2015	2016	2017-2021	2022-2033
Leisure Spend Growth (%)	-0.6	0.0	2.1	2.8	1.3	1.1	1.3

Source: Experian Business Strategies, Retail Planner Briefing Note 12.1 (October 2014).

8.8 **The base year expenditure per capita levels on leisure (Table 8.1) have been projected forward to 2033 using Experian's forecast annual growth rates (Table 8.2) and then applied to the projected population for Guildford zones (Zones 1a, 1b and 1c) and the wider study area to identify the total available expenditure on leisure and recreation goods and services.**

[37] Excludes expenditure on education, insurance, social protection, and 'other leisure' as identified by Experian.

8.9 Table 8.3 shows that available commercial leisure expenditure for the combined sub-zones for Zone 1 (which broadly corresponds to Guildford Borough) is forecast to increase by 46.5% to £323.4m by 2024. By 2029, total available commercial leisure expenditure will increase to £356.0 and to £382.7 by 2033.

Table 8.3 Total Commercial Leisure Expenditure: 2014 – 2033 (£m)

	Zone 1a	Zone 1b	Zone 1c	Zone 1 (all)	Zones 2 to 8	Study Area Average
2014	£55.3	£157.9	£48.0	£261.3	£1,227.0	£1,488.3
2019	£62.3	£177.6	£53.8	£293.8	£1,366.4	£1,660.1
2024	£68.7	£195.4	£59.3	£323.4	£1,503.5	£1,826.9
2029	£75.7	£215.0	£65.3	£356.0	£1,651.0	£2,007.0
2031	£78.6	£223.1	£67.7	£369.3	£1,712.1	£2,081.4
2033	£81.5	£231.1	£70.2	£382.7	£1,774.6	£2,157.3

Source: Table 4 (Appendix 13). All monetary figures are expressed in 2013 prices.

8.10 Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out. This highlights the potential to improve the scale and quality of Class A3 uses in town centres over the development plan period, subject to market demand. The aim should be to strengthen the wider mix of leisure uses and attractions in these town centres as a priority, as they are the most convenient and sustainable locations for the majority of the Borough's residents. It is expected that existing and new leisure uses will be focused in the Borough's main centre (i.e. Guildford town centre), with the potential to improve the offer in some of the Borough's smaller centres (including Wharf Road, Ash and Station Parade, East Horsley District Centres) subject to market interest and demand.

8.11 In the context of this forecast growth in leisure spend, the following commentary identifies the potential 'gaps' in the commercial leisure offer of the Borough's main centres and the likely need for new uses and facilities over the forecast period.

CINEMA

Market Overview

8.12 The significant growth in modern multi-screen cinemas over the last twenty years has been fuelled by a number of factors; including the increase in Hollywood 'blockbusters' and new developments in cinema technology (such as digital 'surround-sound' and, most recently, 3-D screen technology). Most multiplexes that opened during the 1990s were located on large out-of-centre and edge-of-town sites, often as part of shopping centres, retail parks or mixed leisure schemes featuring bowling, nightclubs and restaurants (such as, for example, Star City in Birmingham). Cinemas are important anchors for leisure and retail schemes, helping to generate footfall outside of shopping hours, linked trips and spin-off expenditure to other shops and facilities, including cafés and restaurants. Multiplexes have also been particularly successful in attracting shoppers and visitors into 'dead' areas of shopping centres, such as upper levels or the ends of malls.

8.13 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld, Odeon/UCI; Vue (who operate the multiplexes in Westfield's Stratford and White City schemes); and Showcase (the UK arm of National Amusements of the USA). There was significant consolidation in the UK market in 2012 when Odeon acquired the BFI Southbank and a site from AMC, Vue acquired the Apollo cinema chain and Cineworld acquired Picturehouse. From its beginnings in 1995 Cineworld now operates over 100 cinemas in the UK (including Picturehouse) and accounts for more than one quarter (25.9%) of the cinema box office market. Its most recent openings include the 11-screen cinema on the edge of Leigh town centre in Wigan Borough (November 2011) and as part of Quintain's London Designer Outlet in Wembley (2013).

8.14 According to research by Dodona (a specialist market research consultancy in the cinema industry) there are 769 cinemas in the UK with a total of 3,817 screens, of which approximately three-quarters are multiplexes. The rest of the market is mainly represented by smaller multiplex operators and independents which tend to operate non-multiplex cinemas (i.e. less than five screens) and screens in mixed-use venues (such as arts centres).

8.15 The cinema industry has not been immune from the recession and there have been some closures since 2008, although the majority have been smaller art centre venues rather than the larger chains. Notwithstanding this, the industry generally appears to be in good health. The latest research shows that box office revenue in 2012 in the combined UK and Irish market increased by 2.9% to £1.17bn, although UK admissions fell back by 1.4% to £170m. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.

8.16 In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the '*Screening Room'* concept, characterised by leather chairs and table service. The first 558m^2 '*Screening Room'* cinema opened in June 2011; in the Brewery, Cheltenham.

8.17 Research by Dodona indicates that although fewer larger multiplex cinemas are being developed, there has been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry" as they do not require the large sloping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for the modern cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinema above the store.

Existing Provision and Projected Demand

8.18 Cinema provision in the Borough consists of the Odeon, Bedford Road in Guildford Town Centre. The cinema includes 9 screens with the largest capacity auditorium seating 417 persons.

8.19 The results of the household survey show that 62.2% of the Borough's (Zone 1) population visit the cinema. Of those that visit the cinema in Zone 1, the vast majority visit the Odeon in Guildford Town Centre. The survey also showed that majority of cinema goers from neighbouring Zone 2 and 8 visit Odeon in Guildford (79.4% and 66.2% respectively). For the Study Area as a whole over a third visit Guildford Odeon (34.6%), followed by Cineworld in Aldershot (13.0%) and the Ambassadors Cinema in Woking (14.6%). The analysis demonstrates the popularity of Odeon Guildford and shows that the facility is a key draw for visitors outside of the Borough.

8.20 Appendix 14 illustrates the geographical location of the Odeon in Guildford in relation to competing cinemas in neighbouring boroughs/districts. With regard to frequency of visits, respondents in Zone 1 were more likely to visit the cinema once every month (28.9%). Across the whole Study Area respondents mainly visited the cinema once every three months (31.3%). Only 8.8% of respondents in the Study Area visit the cinema on a more frequent basis (e.g. once a week or fortnight).

8.21 The latest evidence from Data from Dodona indicates that the average screen density for cinema provision in the South East is 6.4 screens per 100,000 people[38] (British Film Institute, Statistical Yearbook 2014).

8.22 Based on this average screen density the table below shows the requirement for additional cinema screens in the Borough based on a catchment comprising the population of Zone 1, 2 and 8.

[38] Table 10.4, Statistical Yearbook 2014, British Film Institute and Dodana Research.

Table 8.4 Guildford Borough Potential Capacity for New Cinema Screens

	2014	2019	2024	2029	2031	2033
Cinema Catchment – Study Zones 1, 2 and 8	188,772	196,621	203,418	209,793	212,105	214,220
Cinema Screen Density (screens per 100,000)	6.4	6.4	6.4	6.4	6.4	6.4
Cinema Screen Potential	12	13	13	13	14	14
Existing Screen Provision (Guildford Odeon only)	9	9	9	9	9	9
Net Cinema Screen Potential	3	4	4	4	5	5

Source: Screen density based on the average for South East England as sourced from the BFI Statistical Year Book 2014 – BFI/ Dodana Research

Notes: Forecast population for Guildford Borough is based on Sub-National Population Projections from ONS.

8.23 The results of our assessment indicate that there is potential quantitative capacity for new cinema screens in the Borough based on the market share of cinema goers to the Borough from the study area. This indicates the potential demand for a multi-screen cinema in Guildford in the future. It should be noted that the demand for new screens is based on market shares remaining constant and does not take account of the potential to attract more cinema users.

8.24 In identifying potential investors, the retailer requirements for 2014 showed that there was a requirement from Curzon Cinemas Ltd for up to 1,400m^2 in a High Street or edge of town location, suggesting there may be interest in investing in new cinema facilities in Guildford Town Centre in the future.

EATING & DRINKING OUT

8.25 The food and beverage sector, including restaurants, bars and pubs (Class A3, A4 and A5), provide an increasingly important part of a town centre's wider offer and economy. They also complement other town centres uses, particularly shops, offices and cinemas, helping to lengthen 'dwell times' (the time people spend in centres) and increase expenditure as part of the same trip.

Market Overview

8.26 As described previously average household spending on leisure services in the UK is dominated by eating and drinking out. Even in the context of the current economic recession this sector has remained buoyant. In terms of the pub trade, some of the key trends in recent years include:

- A move to more flexible opening hours (resulting from licensing reforms implemented in November 2005), combined with pressures arising from lower alcoholic drink prices (particularly in supermarkets), has resulted in a number

of pub operators widening their food and non-alcoholic beverage and the growth of so-called "*gastro-pubs*" as eating-out destinations in competition with more established restaurants.

- **Increased consolidation and closures in the pub industry. According to the Campaign for Retail Ale (CAMRA) there have been 5,800 pub closures since 2008[39]. Recent research by CAMRA also suggests that on average between 18 and 26 pubs are closing every week in the UK.**
- **The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury's Local).**
- **The Home Office has also introduced a much more aggressive policy towards the pub industry. Powers for local authorities to establish Alcohol Disorder Zones (ADZ) are included in the Violent Crime Reduction Act (2006), which also places a charge on pubs and bars in a designated area to pay for additional policing, environmental and other services in the neighbourhood. This increase in costs is also placing further pressure on the profit margins of some pub operators.**

8.27 The restaurant sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include:

- **An increase in promotions and discounts by the multiples to attract customers during off-peak periods (e.g. Pizza Express).**
- **More discerning customers who are basing their decisions to eat out on value for money, but not at the expense of quality in terms of service, food and the overall experience. Two recent successes are Jamie's Italian and Cote. There has also been a growth in '*all-you-can-eat*' style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread).**
- **For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's Pizza.**

8.28 The café sector has also experienced strong growth over the last five years, despite the impact of the economic downturn. The branded coffee chains dominate the market with some 5,531 outlets in 2013 equating to a market share of 54%. Of these, the three leading multiple chains are Costa Coffee (1,670 outlets), Starbucks Coffee Company (790) and Caffè Nero (560), with a combined turnover of £2.6 billion in 2013[40]. Notwithstanding the rise of the multiples, there has also been growth in

[39] Source: Article published by CAMRA on 20th March 2013, www.camra.org.uk
[40] Source: Allegra Strategies

independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic and Fairtrade).

8.29 The strong independent coffee sector has fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, a recent study by management consultancy Allegra Strategies predicts that the total UK coffee shop market still has potential for strong growth, and there is forecast to be over 20,500 outlets by 2018, with a total turnover of £8.7 billion. There would therefore appear to be potential for further growth in the café market, driven mainly by branded coffee chain expansion and non-specialist operator growth.

Existing Provision

8.30 Based on the most recent audit and site visit to the Borough's town and district centres (see Sections 5 and 6), the current provision of Class A3-A5 uses is as follows:

Table 8.5 Current Provision of Class A3-A5 Uses

Location	Class A3		Class A4		Class A5		Total A3-A5	
	No. of Units	% of Total	No. of Units	% of Total	No. of Units	% of Total	No. of Units	% of Total
Guildford Town Centre	53	10.1%	9	1.7%	14	2.7	76	14.5%
Ash District Centre	2	5.6%	1	2.8%	3	8.3%	6	16.7%
East Horsley District Centre	4	12.5%	0	0.0%	1	3.1%	5	15.6%
UK Average	-	8.5%	-	1.5%	-	5.6%	-	15.6%

Source: Guildford Borough Council Town Centre and District Centre Surveys 2013/2014 and CJ site visit, 2014.

8.31 Table 8.5 shows that the main provision of Class A3-A5 uses are heavily concentrated in the main town centre of Guildford. The health check assessment for these centres demonstrated that Guildford has a good selection of food and drink establishments, including national multiples and small independents. The centre has attracted a number of key branded operators over recent years such as Five Guys, Jamie's Italian, Loch Fyne, Bill's, Café Rouge, Yo Sushi, Gourmet Burger Kitchen, Nandos, Wagamamma, Giraffe, Pizza Express and Nando's. Notwithstanding this, the current provision of Class A3-A5 uses in Guildford Town Centre (14.5%) is below the Experian Goad UK average (15.6%). This is surprising given the centre's important role as the Borough's primary shopping, leisure and service destination. There is therefore potential to improve and expand this offer in the future.

8.32 The food and drink (Class A3-A4) offer in the two District Centres is broadly in line with the UK average (15.6%). The proportion of food and drink units in Wharf Road

District Centre is above the UK average. The food and drink offer in both centres is mainly represented by independent operators and the leisure offer in Wharf Road District Centre is mainly dominated by takeaway outlets (A5 uses).

8.33 It is important that Guildford town centre retains and enhances its food and beverage offer, as it not only supports the daytime economy, but is the main driver of the centre's evening economy. As such, measures to attract new operators should be promoted where possible. This could include, for example, better quality restaurants targeted at families to help draw more people to the town centre and encourage them to stay longer.

8.34 In terms of late night entertainment, the site visit identified one major night club or dance venue in the Borough, which is located on Onslow Street in Guildford (i.e. Casino Night Club). We note a number of existing public houses and bars in the town centre operate with late licences. The Survey did not record any nightclub or dance venues in any of the other centres.

8.35 The results of the household survey also help to identify where people living in the study area currently prefer to eat and drink. The key results for the Borough are as follows:

- **A high proportion (83.3%) of respondents visit restaurants and cafes.**
- **Of this total, 86% visit a café or restaurant at least once a month. The survey findings show that eating out is particularly popular, with a quarter of those who eat out visit restaurants and/or cafes at least once a week.**
- **Based on responses in the Borough (Zone 1) only, the majority (77.5%) of respondents normally choose to eat out at restaurants in Guildford town centre. The closest competitor is Godalming, which was the second most frequented location (18.1%) for those in Zone 1C (to the south of the borough). Guildford was also the most popular location for those in Zone 2, and the second most common in Zone 3. Respondents in the other Zones primarily visited the main town in that area (i.e. Woking, Horsham, Aldershot and Farnham); and**
- **Some 58.14% of respondents in the Borough visit pubs, bars, nightclubs and/or music venues. Of these the majority (22.2%) choose venues within Guildford town centre, with a particularly high frequency for respondents in Zone 1 (69.0%). Other frequently visited locations were Horsham (9.8%) and Woking (9.6%). In terms of frequency, 21.3% drink out at least once a week, 32.7% once every two weeks, and 32.5% go once a month and the remainder between once every two months and once a year.**

Forecast Demand for Eating and Drinking

8.36 In order to assess the potential capacity for new eating and drinking establishments we have adopted a standard and robust approach. The assessment focuses on demand

for food and drink floorspace within the Borough's main centres including Guildford Town Centre and the Borough's two District Centres.

8.37 The approach is based on the assumption that between 15% and 20% of the forecast capacity for new comparison goods floorspace (as identified in Section 7) could support a mix of new leisure services including cafés, restaurants, takeaways, pubs and wine bars. This assumption is supported by research that specifically identified that the hospitality industry, in its widest sense, "…*forms an important and sizeable proportion of premises averaging 24% of ground floor stock*"[41]. Furthermore Experian GOAD's centre reports show that on average cafe's, restaurants, bars, pubs and takeaways account for over 15% of floorspace and 18% of outlets in the 2,500 shopping areas that they cover.

8.38 Based on 15% to 20% of the baseline comparison goods capacity forecasts set out in Section 7 we therefore estimate that there is a potential quantitative need for 3,554m^2 to 4,739m^2 of Class A3-A5 gross floorspace in the Borough by 2024. Forecast provision increases to between 7,043m^2 and 9,391m^2 by 2029 and 9,945m^2 to 13,260m^2 by 2033. Please note that the forecast A3-A5 provision is additional to forecast capacity for comparison retail floorspace.

Table 8.6 Eating & Drinking Out - Projected Gross Floorspace (m^2)

	2019	2024	2029	2031	2033
Projected Comparison Floorspace	3,044	16,868	32,686	39,723	46,409
15% of Comparison Floorspace to A3/A4/A5 Uses	652	3,554	7,043	8,512	9,945
20% of Comparison Floorspace to A3/A4/A5 Uses	870	4,739	9,391	11,349	13,260

Source: Table 13 Appendix 11.

8.39 The household survey provides a broad indication of the attraction of restaurants in the Borough. The majority (77%) of respondents to the survey who live in zone 1 normally eat and drink out at venues in the Borough. Respondents in zones 2, 3 and 8 are also likely to choose eating and drinking venues in Guildford (24.3%, 31.0% and 31.8% respectively), although alternative locations were marginally more popular in each, including Haslemere (29.7% in zone 2), Woking (48.1% in zone 3), and Godalming (61.5% in zone 8). This confirms that eating and drinking out is a popular activity and that Guildford's restaurants, cafes and bars attract a strong customer base beyond the Borough. This indicates there could to be demand for new provision.

8.40 In summary, forecast need for new food and beverage uses should be directed to Guildford town centre to help increase competition and choice, and to help stimulate the centre's daytime/evening economies in accordance with national and local policies. However meeting any forecast need for new cafés, restaurants and bars is highly

[41] The Streetscape of major UK cities', Savills (Winter 2004, pg.3).

dependent on the level of market demand and confidence in the centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators will want to locate there. While new investment in Guildford Town Centre should be a priority, the quality of the eating and drinking offer should also be improved in the Borough's other centres at an appropriate scale to meet local demand.

HEALTH & FITNESS NEED

Market Overview

8.41 The health and fitness market has generally performed well during the economic downturn. The latest statistics from The Leisure Database Company[42] (market research specialist for the leisure industry) show that over the twelve month period to March 2013, the industry has grown its total market value by 1.5% to £3.92 billion, its member base by 4.5% and the total number of facilities by 2%. According to the Leisure Database Company (LDC), there were an estimated 6,019 private health clubs and public fitness centres facilities in the UK in 2013, which represented a small net decrease from the 5,900 facilities the previous year[42]. The main operators in the market currently include:

- Esporta, Greens & David Lloyd Leisure – at the premium end of the market focus on health, racquet and tennis clubs;
- Virgin Active & Nuffield Health (previously Cannons) – dominate the mid-range family-oriented health and fitness market; and
- LA Fitness, Fitness First and Bannatyne's Health Clubs – operate smaller in-town clubs at the more value end of the market.

8.42 However, the most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of ("*no frills*") fitness clubs includes EasyGym, Pure Gym, Fitness 4 Less, Fitspace, TruGym and SimplyGym. Their business models are based on significantly discounted monthly subscriptions (of between £10 and £20 on average) and 24-hour opening. Although these clubs provide a basic offer (for example, they do not generally include fitness classes, personal trainers, swimming pools, saunas or steam rooms) they appear well suited to the current economic climate and are proving popular. According to LDC, the budget gym sector now accounts for 6% of total private clubs and 14% of private sector membership.

8.43 Overall, the proportion of the population in 2013 with a gym membership was estimated at 12.6%. According to LDC, the average number of members per club in the UK is estimated to be 1,426, which takes into account the average for independent

[42] The 2013 State of the UK Fitness Industry Report, The Leisure Database Company

venues (726 per club) and leisure chains (2,198 per club). For the larger fitness chains (e.g. David Lloyds, Virgin, LA Fitness, etc.) the average club membership increases to 2,897, while budget chains are even higher at 3,452 members[43].

8.44 The rapid growth of this sector has also been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within existing buildings or as part of mixed use schemes.

Existing Provision

8.45 The table below summarises the current representation of national, regional and independent privately-owned health and fitness operators in the Borough, as well as the Council-owned leisure centre. The geographic locations of most of these health and fitness facilities are identified in Appendix 14.

Table 8.7 Existing Leisure Centres, Fitness Clubs & Gyms in the Borough

Facility	Address	Private Sector	Public Sector
GUILDFORD:			
Surrey Sports Park	Richard Meyjes Road, Guildford	✓	
LA Fitness	Epsom Road, Guildford	✓	
Quantum Health & Fitness	University of Surrey, Guildford	✓	
Spirit Health and Fitness	Post House Hotel, Egerton Road, Guildford	✓	
Virgin active	Queen Elizabeth Park, Railton Rd	✓	
Aqua Roma Leisure	Newlands Corner, Guildford	✓	
ActivZone Gym	Within Guildford College of Furth, Stoke Park, Guildford	✓	
Guildford Spectrum	Parkway, Guildford		✓
ASH:			
Ash Manor Sports Centre	Manor Road, Ash , Surrey		✓

Source: Various

8.46 Guildford's gym and leisure offer include the Guildford Spectrum Leisure Complex, a large multi-activity centre (including ice skating, tenpin bowling, swimming and general fitness), which is owned by the Council and run by a not for profit organisation. It also includes Surrey Sports Park, an elite sports training venue located within the University of Surrey which includes a 50m, 8-lane, Olympic standard swimming pool and multiple health and fitness facilities. The Borough's district centre of Ash is served by a smaller facility run by the council in partnership with a not for profit organisation. It should be noted that this facility is located in the wider Ash area.

[43] Sourced from the 2012 State of the UK Fitness Industry, the Leisure Database Company.

8.47 There are two branded health clubs in Guildford, an LA Fitness and a Virgin Active. Notwithstanding this, it is apparent that despite the Borough's strong population, there is a notable gap in the provision of branded health and fitness clubs. David Lloyd, Fitness First, Bannatyne Health and Fitness, and Pure Gym are not currently represented in the Borough.

8.48 Analysis of the household survey shows that 67.2% of respondents within Zone 1 do not go to a gym or healthclub and/or go swimming. The most frequented facility by far was the Guildford Spectrum Leisure Complex (22.6% of respondents of respondents in Zone 1). Of the 32.8% that do go to the gym, Guildford had relative high retention rates, totalling 52.9% across a number of different facilities:

- Guildford Spectrum, Parkway, Guildford (22.6%)
- Guildford town centre (14.6%)
- East Horsley Village Centre (4.3%)
- ActivZone Gym - within Guildford College of Furth, Stoke Park, Guildford (3.0%)
- LA Fitness Epsom Road, Guildford (2.5%)
- Virgin active, Queen Elizabeth Park, Railton Rd, Guildford (2.3%)
- Quantum Health & Fitness – University of Surrey, Guildford (1.6%)
- Surrey Sports Park (1.0%)

8.49 The household survey results also indicate a relatively low level of leakage to facilities outside the Borough. These include facilities in Esher (5.6% of respondents in Zone 1), Leatherhead (4.5%) and Godalming (3.8%). The strong level of retention indicates a strong demand for health and fitness facilities in the Borough. Investment in health and fitness facilities would also have the potential benefit of improving the current participation rate identified by the survey (32.8%).

Forecast Demand for Health and Fitness

8.50 The need for health and fitness clubs can be linked to the potential demand arising from population growth at the local level. In this case the Zone 1 population is estimated to increase by 15,892 by 2033. It is likely that existing facilities will absorb some of this demand, and average membership levels will change over time in line with the constant changes in fitness facility formats.

8.51 Notwithstanding this, there would appear to be capacity to support an increase in leisure provision in the Borough over the medium to long-term. Based on the zone 1 average participation rate of 32.8%[44] and Guildford's retention rate of 52.9% identified

[44] Participation rate identified from the household survey.

by the household survey, this would potentially result in an additional 2,517 new gym and health and fitness members over the forecast period. Based on average membership rates for private fitness clubs identified earlier in this section, this would support around two new gym facilities in the Borough; although this would fall to one new facility for a larger chain operator such as a David Lloyds.

8.52 As for the other leisure sectors, addressing this forecast capacity will be dependent on the level of market interest and demand. Given that some of the larger chain operators are not represented in the Borough, there may be scope for a new facility. There could also be potential to attract a budget or value operator, as this type of facility would appeal to a wider customer base. In turn this could help to increase participation and/or capture some of the 'leaked' trips to health and fitness facilities outside the Borough.

8.53 While Guildford should continue to be the focus of new leisure provision, there may also be an opportunity to link new leisure facilities with future growth areas and strategic transport sites. Potential locations include the proposed new Local Centres where future housing growth is planned. Other locations for consideration could also include the existing District Centres where provision is currently limited.

BINGO & GAMBLING

8.54 Gambling represents a significant and growing element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/demand for new facilities in the District, if any, based on the available evidence.

Market Overview and Current Provision

8.55 The latest research by *The Gambling Commission* (*Annual Review 2012/13*) indicates that there are over 226 licensed bingo clubs in operation in the UK and six new operators were awarded licences for new venues within the last 12-18 months. In the 12 months up to June 2011 some 3.4% of UK adults visited bingo venues, but research by *Mintel* indicates that the industry has experienced a fall in revenues and admissions over recent years as a result of legislative changes (such as the ban on smoking in public places), the impact of the economic downturn and the growth of online gaming.

8.56 In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smartphone technology through new 'app' development. This forms part of a wider trend and growth in *'remote/online'* gambling, which including gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversity their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes.

8.57 In terms of Casinos, research shows that there were some 79 licenced casinos in the UK in March 2013 of which 25 represent remote/online licences[45]. This sector is dominated by three companies - the Gala Group, Grosvenor Casinos and Stanley Casinos/Stanley Leisure/Genting International. The number of admissions to casinos increased substantially by 25% over the five year period up to 2010/11. This growth is largely explained by larger new casino venues granted licences under the 2005 Gambling Act.

8.58 Based on the available evidence, the Borough currently has no bingo club, with the nearest venue located at Woking (Gala Bingo).. There are also no casinos in the Borough with the most visited casino venue located in Portsmouth (16.6%). The household survey results indicate that bingo and casino gambling is not a major leisure activity for the majority of respondents living in the Borough, with only 4.72% indicating that they frequent bingo clubs or casinos. Of those that do, a high proportion visit a bingo club or casino once a year (50.1%) followed by once a week 28.8%). In our judgement, while the absence of a bingo venue in the Borough suggests an under-provision, the participation rate for this activity is very low. The potential for a new facility is likely to be limited; particularly as operators focus growth toward online bingo formats.

8.59 Similarly, there is unlikely to be sufficient demand to accommodate the introduction of a casino venue. Furthermore, there is unlikely to be demand from casino operators who typically focus new outlets in major leisure destinations.

8.60 In summary, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level, although this will be subject to market interest and demand from other bingo and casino operators. If demand arises in the future, we advise that this should be directed to the Borough's main centres first in accordance with national and local plan policy.

TEN-PIN BOWLING

8.61 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years and remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK[46].

8.62 This sector benefitted from a period of growth from the mid-1990s onwards, fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the successful bowling facilities opened over the last 15-20 years tend to

[45] Source: Gambling Commission Annual Review 2012/2013.

[46] Tenpin Bowling Market UK, Mintel (November 2012)

form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. Examples of the smaller specialist operators include All Star Lanes which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets the corporate/private hire market. Bloomsbury Bowl Lanes also operates from smaller venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.

8.63 The Borough has one 32-lane ten-pin bowling venue located at the Guildford Spectrum Leisure Complex (as shown geographically Appendix 14). The facility includes two licensed bars, a café, two restaurants/ take-aways and other leisure activities (such as indoor climbing and an ice rink). The competing venues are located in Woking (Big Apple Woking) and Horsham (Horsham Superbowl), with additional facilities located in Central London.

8.64 The household survey indicates that family entertainment (such as tenpin bowling and ice skating) are reasonably popular leisure activities, with over 26.3% of respondents living in the Borough (Zone 1) indicating that they partake in this activity. The existing tenpin bowling venue in Guildford captures the majority of trips made by residents in the Borough (56.9%). Of those in the Study Area that do visit family entertainment facilities, they go relatively infrequently with 23.5% once every two months, 21.3% once every three months and 21.1% of respondents visit bowling facilities once a year or less.

8.65 In terms of future needs, we consider provision in the Borough is adequately served by the existing Tenpin outlet in Guildford. This is based on the relatively good participation levels at the Borough level and the limited forecast growth in this sector over the short to medium term. However, as the economy strengthens and as the population increases there may be a need for an additional facility over the long term. If this is the case and market demand exists, then a new facility should be directed to the Borough's town centres first to help maintain and strengthen their diversity of offer and evening economies.

CULTURAL ACTIVITIES

8.66 The results of the 2014 household telephone survey show that over 62.1% of respondents in the Borough engage in cultural activities such as visiting the theatre, concerts or a music venue and 48.6% visit museums, galleries or places of historical and/or cultural interest. The household survey confirms that this form of activity is carried out infrequently with the majority of respondents visiting cultural facilities once every three months to once a year (62.7%). Respondents are also more likely to visit music/ theatre venues and also cultural or historical venues in Central London (41.1%

and 83.0% respectively). This reflects the city's draw as the country's premier leisure and tourist destination, which is easily accessible to residents in Guildford.

8.67 In zone 1, 11.8% visited museums, galleries or places of historical and/or cultural interest in Guildford. Nonetheless, Guildford has a small number of cultural and historical assets including the Guildhall, Guildford Castle, Guildford Cathedral and Guildford Museum. A small museum is also located in Ash.

8.68 The Borough also has three theatre venues; the new G-Live facility, the Yvonne Arnaud Theatre and the Electric Theatre, all located in Guildford town centre. Demand for new cultural facilities (such as theatres) is likely to be limited given the draw to major facilities in Central London. Around 2.3% of respondents in Zone 1 said that a new theatre would improve leisure facilities in the Borough. However there does appear to be potential to promote and market existing facilities to a wider audience.

SUMMARY

8.69 As for retailing, the commercial leisure industry faces considerable challenges and pressures in the current economic climate. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending. There will also be a continued increase in at-home activities due to the advances in computers, tablets, television, gaming, and audio technology. The challenge for town centres and leisure operators in the future will therefore be to attract customers away from their homes.

8.70 The table below shows the percentage of the Study Area's respondents to the household survey who indicated that they do not participate in the various leisure activities identified.

Table 8.8 Respondents in Study Area who do not participate in leisure activities

Leisure Activity	Respondents who do not participate in leisure activities
Eating out in restaurant and/or café	16.7%
Cinema	30.1%
Concert/ theatre/ music venue	37.9%
Drinking out in a pub/ bar/ nightclub	41.9%
Cultural/historical interest	51.1%
Gym/ Healthclub/ Sports facility	66.1%
Family entertainment (incl. ten pin bowling, skating rink)	73.8%
Bingo/ Casino	95.3%

Source: HTIS, July 2014

8.71 The table shows variation in the popularity of particular commercial leisure activities with eating and drinking out, visiting the cinema and going to a concert/ theatre/ music venue the most popular.

8.72 It also shows that the majority of the Study Area's residents do not normally participate in other commercial leisure activities including going to the gym/ healthclub and family entertainment such as tenpin bowling.

8.73 Our review of the District's commercial leisure sector and offer, and the results of the household survey, indicate that there is a relatively good choice of leisure uses. The participation rate for certain leisure activities is particularly high (e.g. restaurants, cinemas, concerts and theatres) and this offers the potential to enhance the overall offer, subject to market demand. There is clearly potential to improve and strengthen the leisure offer in the Borough's main centres to help stimulate their evening economies and increase "dwell times" during the day to the benefit of other shops, businesses and facilities.

8.74 The assessment indicates that there is potential to support at least one branded health and fitness leisure facility based on projected population growth. A new operator could assist in improving the District's market share of gym/health fitness memberships and increasing participation rates in this particular leisure activity.

8.75 In terms of cinema provision, the assessment found that a high proportion of respondents visit the cinema, and Guildford Odeon captures around a third of all cinema visits in the study area. Due to the popularity of this activity and the relative lack of alternative multi-screen provision in the area, there may be an opportunity to increase the cinema provision in Guildford; with a priority for new screens in Guildford Town Centre.

8.76 Potential demand has been identified for eating and drinking out. Given Guildford's strength as a tourist and leisure destination, there is potential to enhance food and drink offer as a means of promoting the Borough's day to evening time economy. As a priority, new floorspace for food and beverage outlets should be directed to Guildford Town Centre with provision directed to District Centres and strategic growth areas, albeit that delivery will be subject to market demand.

9.0 SUMMARY AND CONCLUSIONS

9.1 This study provides a strategic assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses in Guildford Borough area and its main centres. It provides a sound basis, drawing on robust research and survey evidence, to guide the Borough's shopping and leisure needs up to 2033, and to help promote competitive town centre environments in accordance with the NPPF and other material considerations.

RETAIL CAPACITY ASSESSMENT

9.2 Section 7 assessed the Borough-wide capacity for new (convenience and comparison goods) retail floorspace in the study area over the forecast period. The 'baseline' capacity for new retail floorspace is based on the most up to date population projections from the Office of National Statistics (ONS).

9.3 For convenience goods the 'baseline' forecasts identified limited Borough-wide capacity for new retail floorspace in the short to medium term (up to 2024). This is explained by the fact that the Borough is well served by foodstore provision and by new foodstore commitments that have recently opened in the Borough, or are scheduled to open within the next five years; this includes the new Waitrose in Guildford Town Centre. Another key factor is the slowdown in convenience expenditure growth forecast by Experian over the short and medium term. This along with existing levels of foodstore provision and commitments reduces forecast residual expenditure capacity growth. However, capacity emerges from 2029 and by the end of the forecast period (2033) there is capacity (1,734m^2 net) to potentially support a small foodstore.

9.4 In addition, we have identified a qualitative need to provide new convenience provision for planned strategic housing areas in the Borough where there are no existing convenience facilities. A review of catchments for key foodstores in the Borough shows that the planned strategic housing sites sit outside the catchments of local foodstores; while the Ash and Tongham area is not served by any main foodstore in the Borough. As such, there is potential to support local foodstores for the planned housing sites and the potential for a foodstore to meet the needs of existing and future residents in Ash and Tongham. However, any proposals for new foodstores would need to demonstrate that there would be no significant adverse impact on existing centres.

9.5 For comparison goods, there is 'baseline' capacity for 3,044m^2 (net) in 2024. This 'global' capacity significantly increases to 16,586m^2 net by 2024 and increases further to 46,409m^2 net by 2033. By way of reference the *2011 GRLSU* identified a 'baseline' capacity of 27,167m^2 net by 2021 and 55,005m^2 net by 2026. It should be noted that these capacity figures are based on constant market shares. Key investment in the centre, such as if the proposals for a new anchor department store as part of the North Street scheme are delivered, this is likely to increase the retention of comparison expenditure in the Borough and in turn increase capacity.

9.6 **Given the importance of Guildford as a sub-regional shopping centre, we recommend that new comparison floorspace is directed to the town centre as a priority. A number of sites have been identified in the town centre that have the potential to accommodate the majority of forecast floorspace including the North Street site and sites identified for mixed use development in the draft Local Plan. There is also the potential to direct some comparison floorspace to the Borough's District Centres as well as the new Local Centres that will serve the planned strategic housing sites.**

9.7 **It is important to restate that capacity forecasts beyond 5 years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending levels, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current Experian forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term.**

GUILDFORD TOWN CENTRE

9.8 **Guildford is the Borough's principal centre, both in terms of its administrative role and the relative scale of its retail and leisure offer. The centre is the main destination for shopping and leisure activities for the Borough's residents, along with a range of other uses. It also draws a strong customer base from beyond the Borough from visitors, tourists and students, which contribute to the overall viability and vitality of the town's businesses and services.**

9.9 **The heath check assessment and survey findings confirm that the town centre has a strong retail and commercial leisure offer (Section 5). Guildford falls within the top 50 shopping centres in the UK based on Javelin's VenueScore (ranked at 32). The centre's comparison retail offer is above the UK average which is reflected in its strong fashion offer. The renovation of the Friary Centre has strengthened the centre's retail position; and planned investment in the Tunsgate Shopping Centre will further enhance Guildford's profile as a popular shopping destination. Convenience retail offer in the town centre is currently under-represented. However, the planned development of a Waitrose store on York Road will help to claw back shoppers to the Borough's two out-of-centre superstores. The proposed development of the North Street site for new comparison retail and a new anchor department store will considerably enhance the town centre's attraction and profile as a shopping destination.**

9.10 **Guildford also benefits from a good provision of commercial and leisure facilities; particular for eating and drinking out. The centre has attracted a number of high quality and popular restaurant brands over recent years (such as Jamie's Italian, Five Guys, and Loch Fynne), which help to lengthen dwell times in the centre and support the evening economy. There is also the potential qualitative and quantitative need to provide for new cinema screens in the town centre, which would further enhance visitor numbers to Guildford.**

9.11 Despite the impact of the economic downturn on market demand, there remains strong interest from retail and commercial leisure operators for representation in the town centre. Furthermore, notwithstanding Guildford's positive performance, there appears to be scope for improvement in the scale and quality of its retail and leisure offer to help meet the increased competition from major centres (e.g. Kingston-upon-Thames) and shopping schemes outside the Borough over the development plan period, as well as the threat of online shopping.

DISTRICT CENTRES OVERVIEW

9.12 The heath check assessments for Wharf Road, Ash and Station Parade, East Horsley District Centres show that both centres, to varying degrees, are viable and are meeting the day-to-day retail, leisure and service needs of their local catchments (see Section 6).

9.13 Key indicators of town centre performance show that the centres are performing well. For example vacancy levels in both centres are below the national average.

9.14 In terms of their convenience and comparison goods retail offer, Station Parade, East Horsley provides a relatively good range and choice of shops that is broadly representative of its role and function in the retail hierarchy. The centre's food and convenience offer anchored by a Budgens store (357m^2 gross). The capacity assessment identifies the potential to accommodate a small quantum of convenience floorspace; enough to support a small extension to an existing store.

9.15 The level of retail offer in Wharf Road, Ash District Centre is more basic with convenience retail largely limited to a Budgens store (598m^2 gross).

9.16 Comparison retail provision for both centres is limited, but commensurate for the size and role of these centres. Notwithstanding this, there could be potential improve their offer to help maintain their position in the face of increasing competition from other centres and shopping facilities both within and outside the Borough. However the level of new floorspace provision in these centres will necessarily be subject to market demand and the identification/ allocation of suitable and viable in-centre sites.

9.17 In terms of commercial leisure provision, the offer is mostly limited to day time eating and drinking out. Subject to market demand, there may be potential to improve leisure facilities; particularly in Wharf Road, Ash District Centre to cater for the potential future demand from planned housing growth in the wider Ash and Tongham area.

LOCAL CENTRES OVERVIEW

9.18 A high level review and audit of the retail, leisure and wider provision in the Borough's 22 Local Centres (see Section 6) identified that in general, they have a more limited range of retail and services that meet the basic day-to-day needs of their local population. However, the review did also identify that a number of the local centres include a greater range of retail, leisure and service provision than the Borough's two district centres. In particular, Ripley is functioning well beyond the role of a local centre due to its strong retail and service offer. Therefore, consideration should be given to designating the centre as a District Centre. Conversely, retail, leisure and service offer in Manor Road Local Centre is under-provided and demand for facilities appears limited. In this case, consideration should be given to removing these centres from the retail hierarchy.

9.19 The review also provided advice on centre boundaries. It identified centres where the contraction of existing boundaries could provide more focus on protecting key local facilities. Conversely, the review also identified local centres where the expansion of their centre boundary could strengthen retail and service facilities by including key edge of centre sites and thereby help stimulate development/ investment.

IMPACT ASSESSMENT - FLOORSPSPACE THRESHOLD

9.20 Finally, we have reviewed whether there is a policy requirement for the local planning authority to set a local floorspace threshold rather than use the default threshold of 2,500m^2 gross identified by the NPPF (paragraph 26), above which applicants are required to carry out an impact assessment for new retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan.

9.21 The *National Planning Practice Guidance* (NPPG) published in March 2014 provides helpful advice in setting a locally appropriate threshold and states that it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

9.22 In this case, the evidence shows that the role and function of the Borough's district and local centres is mainly reliant on convenience goods shopping. The main foodstore 'anchors' are important generators of linked trips and footfall and benefit each centre's overall vitality and viability. This needs to be considered alongside the fact that there is no Borough-wide 'global' capacity for new convenience goods retail floorspace due to the significant number of new foodstore commitments that are scheduled to open over

the next five years. Notwithstanding this, the finer level analysis of capacity has identified the potential for modest net additions to the existing provision in the Borough's main centres over the development plan period to help maintain and improve their overall offer.

9.23 In general terms national retailers seeking space in town centre and out-of-centre locations usually have requirements for retail units of 500m^2 gross and above. Also stores with floorspace over 500m^2 gross are unlikely to be a purely local facility and will tend to draw trade from outside of their immediate local catchment[47]. As a result it is unlikely that standalone out-of-centre stores and shopping destinations (e.g. retail units in retail parks) will seek floorspace below this threshold; their 'business models' and competitive advantage over other stores and shopping locations is largely predicated upon trading from larger format retail units and drawing customers from wider catchment areas. We therefore conclude it is reasonable for applicants proposing developments of this size and above to demonstrate that they will not have a significant adverse impact on town centres either on their own or cumulatively with other commitments in the area.

9.24 Based on the evidence we consider that there is justification in this case for a lower convenience goods impact threshold of 500m^2 gross for proposals on the edge of or outside of Guildford Town Centre and the Borough's district and local centres. In our judgement this is a reasonable threshold as it will enable the local planning authority to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres.

9.25 Notwithstanding this, the Council will be aware that the average size of convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.) and other operators (for example, Nisa and Spar) is generally below the 500m^2 gross threshold. Although we consider that setting a floorspace threshold below 500m^2 could potentially be too inflexible and restrictive, we nevertheless advise the Council to carefully monitor and assess the impacts of proposals for smaller convenience stores in the Borough on a case-by-case basis, specifically where these types of stores are proposed on the edge or outside of existing local centres that are highly dependent on convenience ('top-up') shopping for their overall vitality and viability, including footfall and linked trips.

9.26 For comparison goods we consider that a 'blanket' floorspace threshold of 500m^2 net is also reasonable and will allow the Council to have greater control of smaller proposals at out-of-centre locations, such as Section 73 proposals to remove A1 restricting conditions (e.g. bulky goods). The threshold level also generally represents the

[47] According to the Sunday Trading laws a 'large shop' is defined as being over 280m^2 gross. This provides a broad indication at the national level as to what constitutes a 'large shop' capable of generating a reasonable amount of trade (and, therefore, the potential to result in an impact on shopping patterns).

minimum large format store preferred by retailers, thereby providing control over potential stand-alone applications.

9.27 Consideration should also be given to the need to assess retail impact on large retail developments within town centre locations or as part of new settlements. For example, the emerging proposals for North Street include the provision of circa 47,500m^2 (gross) of retail floorspace (includes the demolition of existing units). For a scheme of this size, it would be prudent to establish how the proposal will deliver benefits for Guilford Town Centre and how it will potentially impact on footfall and trade patterns across the town centre. Similarly, retail proposals above 500m^2 contained as part of the strategic housing growth areas should also be assessed in terms of their potential impact on centres where there is likely to be trade diversion.

9.28 Notwithstanding this, it is important that the scope and detail of any Retail Impact Assessment (RIA) required in support of planning application is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The scope and level of detail included within a RIA should be proportionate with the scale of the proposal, and should be agreed with the Council on a case-by-case basis.

GLOSSARY & ABBREVIATIONS

TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes

	locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. (For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre).
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous

	accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE 'PRODUCTIVITY' ('EFFICIENCY') GROWTH	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an

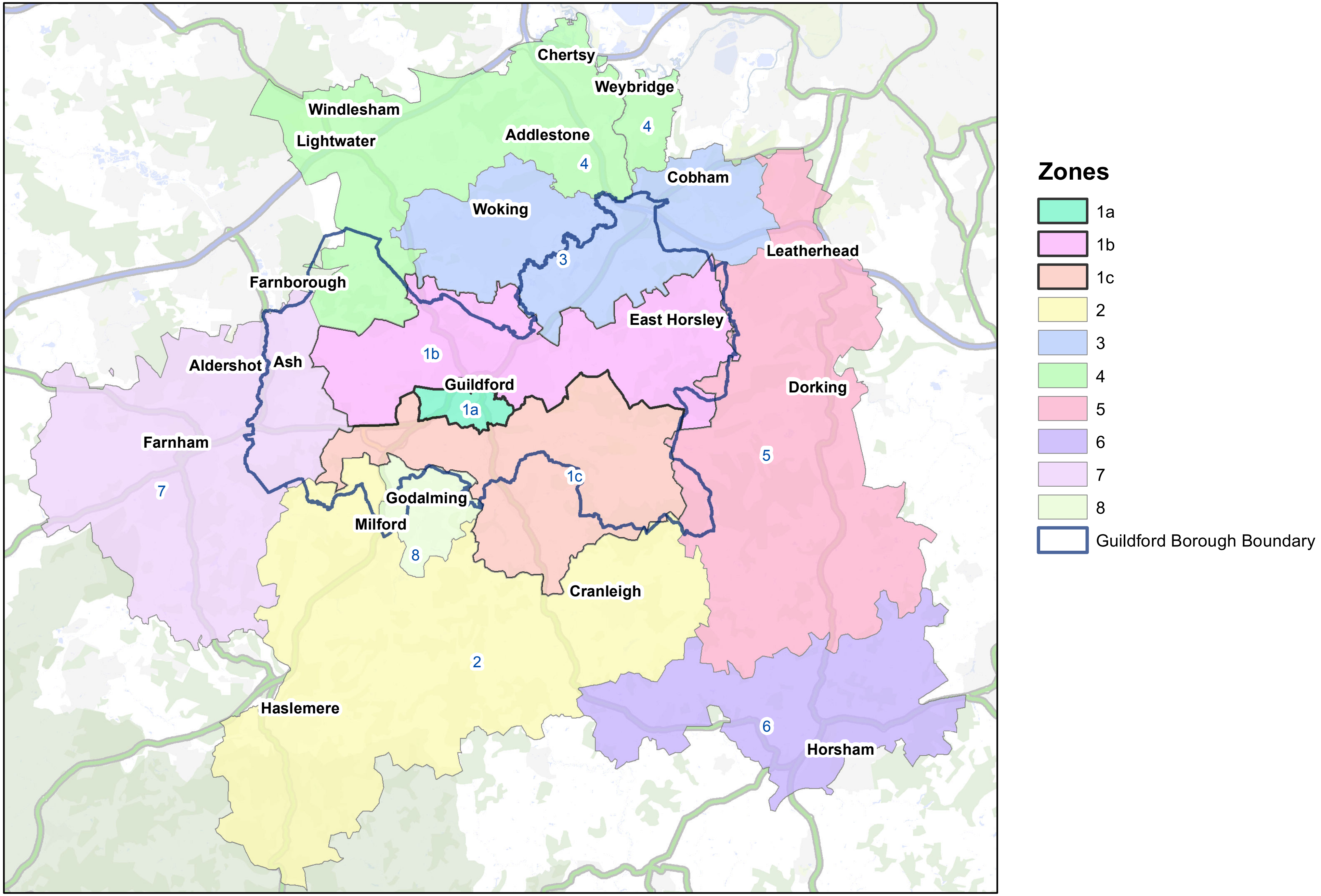
	expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	**In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, the** *Practice Guidance* **advises that such turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.**

– END –

APPENDIX 1: STUDY AREA & ZONES PLAN

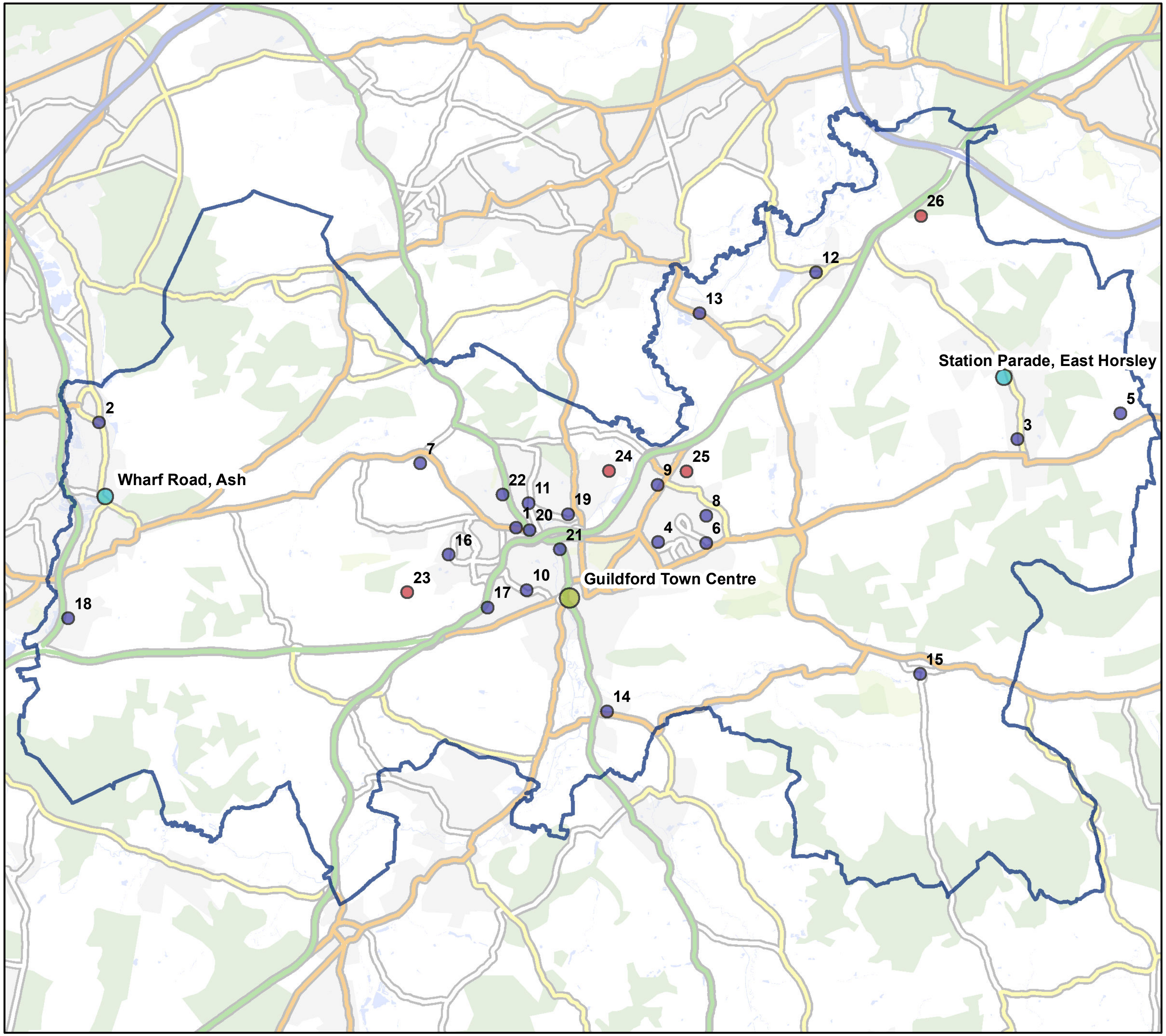
Guildford Key Centres and Survey Zones

Carter Jonas



APPENDIX 2: TOWN, DISTRICT AND LOCAL CENTRES PLAN

Guildford Town, District and Local Centres



Carter Jonas

Centre Type

- Town Centre
- District Centre
- Local Centre
- Potential New Local Centre

Local Centres and Potential New Local Centres

1 Aldershot Road, Westborough
2 Ash Vale, Station Parade
3 Bishopsmead Parade, East Horsley
4 Collingwood Crescent, Boxgrove
5 Effingham
6 Epsom Road, Merrow
7 Fairlands
8 Kingfisher Drive, Merrow
9 London Road, Burpham (Kingpost Parade)
10 Madrid Road, Guildford Park
11 Manor Road, Stoughton
12 Ripley
13 Send
14 Shalford
15 Shere
16 Southway, Park Barn
17 The Square, Onslow Village
18 The Street, Tongham
19 Stoughton Road, Bellfields
20 Woodbridge Hill, Guildford
21 Woodbridge Road, Guildford
22 Worplesdon Road, Stoughton
23 Blackwell Farm
24 Slyfield Area Regeneration Project
25 Gosden Hill Farm
26 Wisley Airfield

APPENDIX 3: FOODSTORE PROVISION PLAN

Convenience Provision in Guildford and the Study Area

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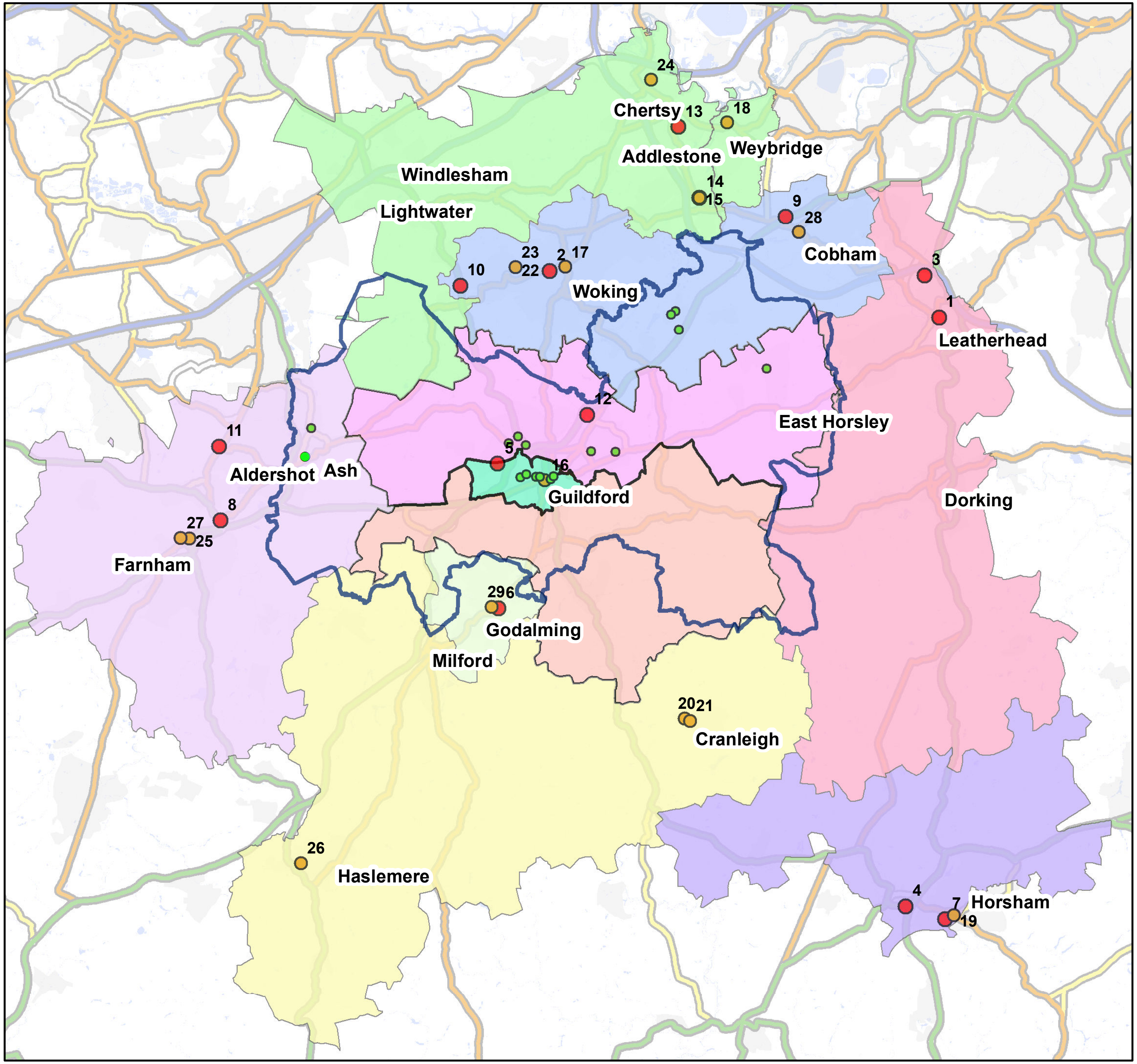


Legend

Superstores (>2,500 m^2 net)

1 Sainsbury, The Swan Centre, Leatherhead
2 Morrisons, Goldsworth Road, Woking
3 Tesco, Oxshott Road, Leatherhead
4 Tesco Extra, Horsham, Wickhurst Lane, Horsham
5 Tesco, Ashenden Road, Guildford
6 Sainsbury, Woolsack Way, Godalming
7 Sainsbury, 7 Worthing Road, Horsham
8 Sainsbury, Water Lane, Farnham
9 Sainsbury, Bridge Way, Cobham
10 Sainsbury, Redding Way, Woking
11 Tesco, 5 Wellington Avenue, Aldershot
12 Sainsbury, Clay Lane, Guildford
13 Tesco Extra, Addlestone, Addlestone
14 Tesco Extra, Brooklands, Weybridge

Supermarket (1,000 to 2,500 m^2 net)

15 Marks & Spencer, Barnes Wallis Drive, Weybridge
16 Marks & Spencer, 61-65 High Street, Guildford
17 Sainsbury, 13 Wolseley Walk, Woking
18 Waitrose, 62-66 High Street, Weybridge
19 Waitrose, 18 Pirie's Place, Horsham
20 Sainsbury, Stocklund Square, Cranleigh
21 Co-op Market Town, Village Way, Cranleigh
22 Waitrose, 1 Goldsworth Park Centre, Woking
23 Waitrose, 60 Station Approach, West Byfleet
24 Sainsbury, 1 Sainsbury Centre, Chertsey
25 Sainsbury, 16 South Street, Farnham
26 Tesco, Lion Green, Haslemere
27 Waitrose, The Hart, Farnham
28 Waitrose, 16-18 Between Streets, Cobham
29 Waitrose, 11-14 Bridge Street, Godalming

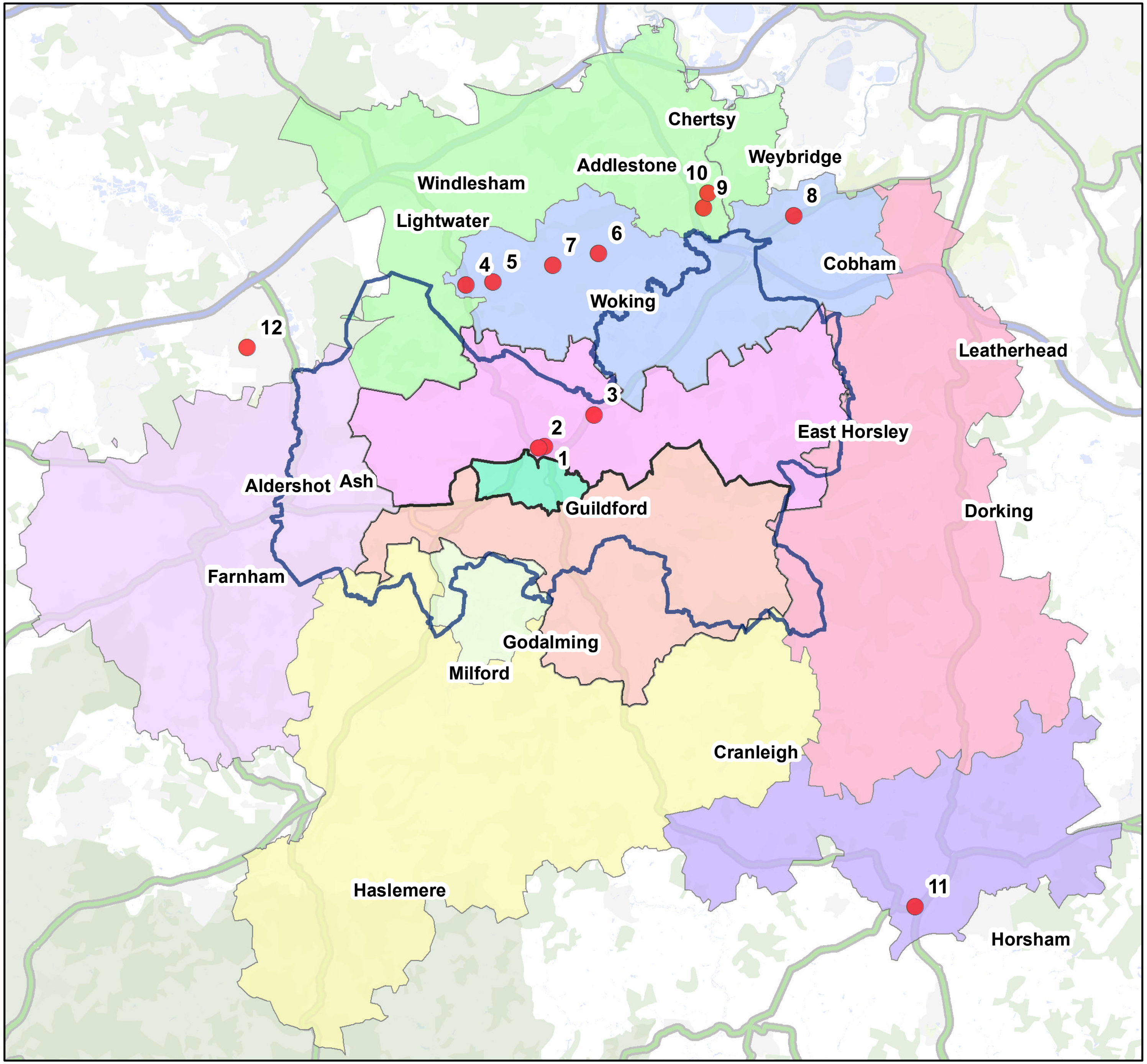
Other in Guildford Borough (Shown on map, not labelled)

Budgens, Lovelace Works, High Street, Ripley, Guildford
Budgens, 1-2 Station Parade, East Horsley, Guildford
Budgens (Duffy's), Wharf Road, Ash District Centre
Co-operative Food, 69 Ash Street, Guildford
Co-operative Food, 48 Woodbridge Hill, Guildford
Co-operative Food, 121b Aldershot Road, Guildford
Co-operative Food, 12-14 Madrid Road, Guildford
M&S Simply Food, A3 Wisley By Pass, Guildford
M&S Simply Food, Merrow BP, 213 Epsom Rd, Guildford
M&S Simply Food, Guildford Railway Station, Guildford
Morrisons Local, 193 High St, Guildford
One Stop, 40 High Street, Guildford
One Stop, 119-121 Collingwood Crescent, Guildford
One Stop, 5-7 Old Palace Road, Guildford
One Stop, Stag Hill, Guildford
Sainsbury, 148-150 High Street, Guildford
Sainsbury's Local, 124-126 Worplesdon Road, Guildford
Tesco Express, 7-11 Bridge Street, Guildford
Tesco Express, Lysons Ave, Ash Vale, Guildford

APPENDIX 3: FOODSTORE PROVISION PLAN

Study Area Key Centres and Retail Parks

Carter Jonas



CentreType

Retail Park/ Solus Stores

Retail Parks/ Store Names

1	Ladymead Retail Park
2	Woodbridge Road
3	Sainsbury's, Clay Lane
4	Redding Way, Knaphill
5	Wickes, Knaphill
6	Lion Retail Park, Woking
7	Jewson Ltd, Horsell
8	Sainsbury,s, Cobham
9	Wey Retail Park, West Byfleet
10	Paddock Retail Park, Weybridge
11	Broadbridge Heath Retail Park, Horsham
12	Solartron Retail Estate, Farnborough

APPENDIX 4: OUT-OF-CENTRE RETAIL PROVISION PLAN

Guildford Household Survey for Planning Perspectives

Q01 In which store do you normally shop at for all your household's main food and grocery shopping needs (i.e. primarily bulk 'trolley' purchases)?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda, Lion Retail Park, Woking	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	7	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Asda, West Meade, Farnborough	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.6%	1	0.0%	0	0.0%	0	2.1%	4	0.8%	0
Co-op Market Town, Village Way, Cranleigh	0.4%	4	0.0%	0	0.0%	0	5.5%	2	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, 12-14 Madrid Road, Guildford	0.1%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, East Street, Farnham	0.4%	4	0.8%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	2.5%	1
M&S Simply Food, Guildford Railway Station, Guildford	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, MERROW BP, 213 EPSOM RD, Guildford	0.1%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Marks & Spencer, 61-65 High Street, Guildford	0.3%	3	4.0%	2	0.0%	0	1.2%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Marks & Spencer, Barnes Wallis Drive, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Goldsworth Road, Woking	1.7%	17	0.8%	0	1.4%	2	0.0%	0	0.8%	1	7.4%	13	0.8%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Morrisons Local, 193 High St, Guildford	0.1%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
One Stop, 5-7 Old Palace Road, Guildford	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 1 Sainsbury Centre, Chertsey	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 13 Wolseley Walk, Woking	0.3%	3	0.0%	0	0.0%	0	0.9%	0	0.0%	0	1.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 148-150 High Street, Guildford	1.3%	13	12.4%	5	3.5%	4	3.1%	1	0.0%	0	1.5%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 16 South Street, Farnham	1.5%	15	0.0%	0	1.5%	2	0.0%	0	0.7%	1	0.5%	1	0.0%	0	0.7%	1	0.0%	0	6.4%	11	0.0%	0
Sainsbury's, 6-8 Cambridge Walk, Camberley	0.4%	4	0.0%	0	0.7%	1	0.0%	0	0.8%	1	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 7 Worthing Road, Horsham	2.8%	28	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	2.6%	3	34.4%	24	0.0%	0	0.0%	0
Sainsbury's, Blackwater Valley Road, Camberley	0.6%	6	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.8%	1	1.7%	2	0.0%	0	1.3%	2	0.0%	0
Sainsbury's, Bridge Way, Cobham	2.0%	20	0.0%	0	7.9%	9	0.9%	0	0.0%	0	2.8%	5	0.5%	1	5.1%	6	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Clay Lane, Guildford	5.9%	59	15.0%	6	38.0%	42	10.5%	3	0.8%	1	3.4%	6	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Redding Way, Woking	9.0%	90	3.0%	1	2.0%	2	0.0%	0	0.0%	0	46.4%	79	4.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Guildford Household Survey
for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury's, Stocklund Square, Cranleigh	1.0%	10	0.0%	0	0.0%	0	5.0%	2	9.3%	7	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Swan Centre, Leatherhead	3.7%	37	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.3%	36	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Water Lane, Farnham	4.4%	44	1.6%	1	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.1%	42	0.0%	0
Sainsbury's, Woolsack Way, Godalming	5.5%	55	6.3%	2	0.0%	0	33.7%	10	13.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	14	47.8%	18
Tesco Extra, Addlestone Extra, Addlestone	4.1%	41	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	21.5%	40	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	4.8%	48	0.0%	0	1.8%	2	0.0%	0	0.0%	0	2.0%	3	20.8%	39	3.3%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	2.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	39.6%	28	0.0%	0	0.0%	0
Tesco, 5 Wellington Avenue, Aldershot	6.6%	66	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	37.6%	65	0.0%	0
Tesco, Ashenden Road, Guildford	3.9%	39	33.5%	13	15.0%	17	6.4%	2	1.8%	1	2.8%	5	0.0%	0	0.0%	0	0.8%	1	0.0%	0	3.1%	1
Tesco, Lion Green, Haslemere	3.0%	30	0.0%	0	0.0%	0	0.0%	0	36.4%	29	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Tesco, Oxshott Road, Leatherhead	1.7%	17	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	15	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 7-11 Bridge Street, Guildford	0.3%	3	3.7%	1	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Guildford Rd, Guildford	0.1%	1	0.9%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 1 Goldsworth Park Centre, Woking	1.9%	19	0.0%	0	1.4%	2	0.0%	0	0.0%	0	9.1%	15	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 11-14 Bridge Street, Godalming	3.7%	37	9.1%	3	2.3%	3	20.4%	6	9.5%	8	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	41.2%	15
Waitrose, 16-18 Between Streets, Cobham	2.1%	21	0.0%	0	7.7%	9	0.0%	0	0.0%	0	1.8%	3	1.3%	2	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Waitrose, 18 Pirie's Place, Horsham	0.8%	8	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	9.0%	6	0.0%	0	0.0%	0
Waitrose, 60 Station Approach, West Byfleet	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	4.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 62-66 High Street, Weybridge	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, Frimley, Surrey	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Waitrose, The Hart, Farnham	0.5%	5	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0
Internet	5.8%	58	3.6%	1	1.8%	2	1.8%	1	5.9%	5	13.2%	22	4.5%	8	4.8%	5	5.1%	4	5.2%	9	1.9%	1
Aldi, Church Street, Walton-on-Thames	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, London Road, Blackwater, Camberley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Guildford Household Survey for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda, Pegler Way, Crawley	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Co-op Welcome, Middle Street, Shere, Guildford	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Ash Street, Ash	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, St. Johns Street, Farncombe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Iceland, Woolmead Road, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Lidl, Dukes Head, Hepworth Way, Walton-on-Thames	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, North Street, Leatherhead	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	4	0.0%	0	0.0%	0	0.0%	0
Lidl, Vincent Lane, Dorking	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.4%	3	2.3%	2	0.0%	0	0.0%	0
Lidl, Wellington Centre, Aldershot	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Bookham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Bramley	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Local shops, Chertsey	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Dunsfold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Great Bookham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Guildford	0.1%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	0	0.0%	0	0.0%	0
Local shops, Onslow	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Wickham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Woking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Food Outlet, Union Street, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
M&S Simply Food, Warrens Yard, High Street, Cranleigh	0.3%	3	0.0%	0	0.0%	0	2.0%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, St Martins Square, Dorking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Swan Walk, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Marks & Spencer, The Meadows, Marshall Road, Camberley, Sandhurst	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Alexander Road, Aldershot	0.9%	9	0.0%	0	2.2%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	6	0.0%	0
Morrisons, Bell Street, Reigate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Broadfield Community Centre, Broadfield Barton, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Sainsbury's Local, The	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Grove, Headley Road, Grayshott, Hindhead																						
Sainsbury's Midhurst Road, Liphook	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bagshot Road, Ringmead, Bracknell	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Sainsbury's, High Street, Dorking	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Midhurst Road, Liphook	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, New Zealand Avenue, Walton-on-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stafford Road, Wallington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Portsmouth Road, Godalming	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Queens Road, Weybridge	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Pinchington Lane, Newbury	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Tesco Extra, Reigate Road, Hookwood, Horley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, The Meadows, Marshall Road, Camberley, Sandhurst	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Waitrose, Ashley Centre, Epsom	0.4%	4	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, Dorking	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Waitrose, London Road, Sunningdale	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, West Street, Haslemere	0.4%	4	0.0%	0	0.0%	0	0.0%	0	5.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	1.9%	19	0.0%	0	1.4%	2	1.2%	0	0.0%	0	0.0%	0	7.1%	13	0.0%	0	2.0%	1	1.5%	3	0.0%	0
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Guildford Household Survey
for Planning Perspectives

Q02 How do you normally travel to (STORE MENTIONED AT Q01)?
Those who don't shop online at Q01

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Car / van (as driver)	79.9%	754	57.9%	21	81.2%	89	82.8%	25	73.7%	55	76.2%	112	88.5%	157	81.5%	84	81.0%	54	81.1%	133	67.7%	24
Car / van (as passenger)	6.4%	61	13.5%	5	10.0%	11	6.6%	2	4.1%	3	8.7%	13	4.6%	8	6.9%	7	6.1%	4	3.1%	5	7.7%	3
Bus, minibus or coach	1.7%	16	4.8%	2	0.7%	1	5.3%	2	2.2%	2	2.3%	3	0.0%	0	2.7%	3	2.1%	1	1.4%	2	2.0%	1
Using park & ride facility	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Motorcycle, scooter or moped	0.1%	1	0.8%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	8.2%	78	20.9%	8	3.9%	4	4.0%	1	18.6%	14	11.2%	16	6.9%	12	8.3%	9	5.0%	3	1.4%	2	21.1%	8
Taxi	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Train	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.2%	2	1.2%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Mobility scooter	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Delivered	2.6%	24	0.8%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3	11.7%	19	0.9%	0
(Don't know)	0.6%	6	0.0%	0	1.7%	2	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.1%	1	0.7%	1	0.8%	0
Weighted base:		945		36		109		30		75		147		178		103		67		163		36
Sample:		956		96		99		98		96		88		95		95		96		94		99

Q03 In addition to (STORE MENTIONED AT Q01), is there any other store that you regularly use for your main-food shopping? [MR]

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda, Lion Retail Park, Woking	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5	2.0%	4	0.0%	0	0.0%	0	1.1%	2	0.0%	0
Asda, West Meade, Farnborough	0.9%	9	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	4.3%	7	0.0%	0
Co-op Market Town, Village Way, Cranleigh	1.0%	10	0.0%	0	0.0%	0	0.0%	0	8.2%	7	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, 12-14 Madrid Road, Guildford	0.2%	2	3.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Co-operative, 121b Aldershot Road, Guildford	0.1%	1	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, East Street, Farnham	1.2%	12	1.8%	1	0.7%	1	3.3%	1	0.0%	0	0.5%	1	0.0%	0	0.6%	1	0.0%	0	4.5%	8	0.7%	0
M&S Simply Food, Guildford Railway Station, Guildford	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
M&S Simply Food, MERROW BP, 213 EPSOM RD, Guildford	0.5%	5	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Marks & Spencer, 61-65 High Street, Guildford	0.9%	9	9.3%	3	1.4%	2	3.6%	1	0.7%	1	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Barnes Wallis Drive, Weybridge	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.6%	7	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Morrisons, Goldsworth Road, Woking	1.4%	14	0.8%	0	0.0%	0	1.8%	1	0.0%	0	7.3%	12	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.7%	0
Morrisons Local, 193 High St, Guildford	0.2%	2	0.9%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.3%	1
Sainsbury's, 1 Sainsbury Centre, Chertsey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 148-150 High Street, Guildford	1.5%	15	15.7%	6	4.1%	5	8.5%	3	1.4%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 16 South Street, Farnham	0.7%	7	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	6	0.0%	0
Sainsbury's, 7 Worthing Road, Horsham	1.7%	17	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	20.6%	15	0.0%	0	0.0%	0
Sainsbury's, Blackwater Valley Road, Camberley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Sainsbury's, Bridge Way, Cobham	1.0%	10	0.0%	0	4.4%	5	0.0%	0	0.0%	0	0.0%	0	0.5%	1	3.7%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Clay Lane, Guildford	1.1%	11	7.0%	3	4.0%	4	1.8%	1	0.0%	0	1.4%	2	0.0%	0	0.6%	1	0.7%	0	0.0%	0	0.0%	0
Sainsbury's, Redding Way, Woking	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	14	2.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stocklund Square, Cranleigh	1.1%	11	0.0%	0	0.7%	1	4.1%	1	10.8%	9	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Swan Centre, Leatherhead	1.6%	16	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	15	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury's, Water Lane, Farnham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Sainsbury's, Woolsack Way, Godalming	1.8%	18	1.7%	1	0.0%	0	7.3%	2	6.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	25.8%	9
Sainsbury's Local, 124-126 Worplesdon Road, Guildford	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	4.1%	41	0.0%	0	1.0%	1	0.0%	0	0.0%	0	8.0%	14	14.2%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	1.3%	13	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	1.7%	2	12.9%	9	0.0%	0	0.0%	0
Tesco, 5 Wellington Avenue, Aldershot	2.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	10	0.0%	0	0.0%	0	0.7%	0	9.1%	16	0.0%	0
Tesco, Ashenden Road, Guildford	1.5%	15	7.5%	3	5.3%	6	1.9%	1	2.6%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	1
Tesco, Lion Green, Haslemere	0.7%	7	0.0%	0	0.8%	1	0.0%	0	7.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Oxshott Road, Leatherhead	1.9%	19	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	17.4%	19	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 7-11 Bridge Street, Guildford	0.2%	2	0.8%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Tesco Express, Guildford Rd, Guildford	0.1%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Waitrose, 1 Goldsworth Park Centre, Woking	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	21	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, 11-14 Bridge Street, Godalming	2.2%	22	4.8%	2	1.8%	2	9.7%	3	6.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	25.0%	9
Waitrose, 16-18 Between Streets, Cobham	1.6%	16	0.0%	0	5.3%	6	0.0%	0	0.0%	0	1.7%	3	0.0%	0	6.3%	7	0.0%	0	0.0%	0	0.0%	0
Waitrose, 18 Pirie's Place, Horsham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.5%	1	0.0%	0	4.1%	3	0.0%	0	0.0%	0
Waitrose, 60 Station Approach, West Byfleet	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	6	4.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 62-66 High Street, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, The Hart, Farnham	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	5.8%	10	0.0%	0
Internet	1.2%	12	2.5%	1	0.0%	0	2.2%	1	1.8%	1	1.0%	2	0.0%	0	4.0%	4	1.5%	1	0.6%	1	1.9%	1
Aldi, Church Street, Walton-on-Thames	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, London Road, Blackwater, Camberley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Asda, Portland Road, Waterlooville	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Roehampton Vale,	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Roehampton																						
Budgens, Rowledge, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-op Welcome, Middle Street, Shere, Guildford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Ash Street, Ash	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-operative Food, Church Road, Milford, Godalming	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Cobb House, Oyster Lane, Byfleet	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	7.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Farnborough Road, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-operative Food, Lion Green, Shottermill, Haslemere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Marshal Parade, Coldharbour Road, Pyrford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, North Parade, Warnham Road, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Co-operative Food, St. Johns Street, Farncombe	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Co-operative Food, The Square, Bagshot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Imperial Way, Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1	0.0%	0	0.0%	0
Costco, Templer Avenue, Farnborough	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Duffy's Budgens, Guildford Road, Lightwater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Duffy's Budgens, Wharf Road, Ash Vale	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Victoria Road, Aldershot	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
John Lewis, Wood Street, Kingston-upon-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, North Street, Leatherhead	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	8	0.0%	0	0.0%	0	0.0%	0
Lidl, Vincent Lane, Dorking	0.3%	3	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0
Lidl, Wellington Centre, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Boxgrove	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Guildford Household Survey
for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Local shops, Byfleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Camberley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Dorking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Elstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Farnham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Local shops, Godalming	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Local shops, Guildford	0.3%	3	2.1%	1	2.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Horsham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0	0.0%	0
Local shops, Shalford	0.1%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Telford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Woking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, High Street, Petersfield	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, The Broadway, Tolworth Towers, Surbiton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Warrens Yard, High Street, Cranleigh	0.1%	1	0.0%	0	0.0%	0	0.9%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, St Martins Square, Dorking	0.2%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Swan Walk, Horsham	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	5	0.0%	0	0.0%	0
Marks & Spencer, The Meadows, Marshall Road, Camberley, Sandhurst	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Marks and Spencers, Barnes Wallis Drive, Brooklands	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Alexander Road, Aldershot	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	10	0.0%	0
Morrisons, Broadfield Community Centre, Broadfield Barton, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Peacocks, Collingwood Crescent, Guildford	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Ash Road, Aldershot	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Sainsbury's Local, Cobham Road, Fetcham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Midhurst Road, Liphook	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Hectors Way, Newbury	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Sainsbury's, High Street, Dorking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Midhurst Road,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Liphook																						
Sainsbury's, New Zealand Avenue, Walton-on-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Queensmead, Farnborough	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Sainsbury's, The Causeway, Staines-upon-Thames	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, London Road, Blackwater, Camberley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Lysons Avenue, Ash Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Express, Portsmouth Road, Godalming	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Queens Road, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Reigate Road, Dorking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Ridgway Road, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco, Whitton Road, Bracknell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, Dorking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Waitrose, London Road, Sunningdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, West Street, Haslemere	1.0%	10	0.0%	0	0.0%	0	0.0%	0	13.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	3.2%	32	2.3%	1	3.2%	4	2.5%	1	0.0%	0	0.0%	0	7.7%	14	2.5%	3	0.6%	0	5.1%	9	1.6%	1
(Nowhere else)	42.2%	423	43.2%	16	55.9%	62	48.8%	15	26.1%	21	45.4%	77	42.8%	80	28.4%	31	43.2%	31	45.2%	78	34.8%	13
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q04 When you visit (STORE MENTIONED AT Q01) for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? If so, what activities? [MR]
Not those who shop online at Q01

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes - non-food shopping	12.4%	118	8.5%	3	7.5%	8	20.5%	6	12.7%	10	3.3%	5	14.9%	26	20.2%	21	26.6%	18	7.7%	13	22.9%	8
Yes - other food shopping	7.5%	71	6.3%	2	7.3%	8	5.8%	2	4.7%	4	17.6%	26	2.9%	5	8.2%	8	3.6%	2	6.2%	10	8.0%	3
Yes - bars / pubs	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Yes - bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - cafes	1.9%	18	4.2%	2	2.2%	2	0.8%	0	1.4%	1	0.0%	0	3.1%	6	0.0%	0	5.3%	4	0.6%	1	7.2%	3
Yes - cinemas	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - get petrol	3.1%	29	1.7%	1	9.4%	10	1.9%	1	0.0%	0	1.8%	3	1.1%	2	2.9%	3	3.8%	3	3.0%	5	7.4%	3
Yes - go to park	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Yes - gyms/ health and fitness	0.4%	4	1.3%	0	0.0%	0	1.0%	0	1.6%	1	0.0%	0	0.0%	0	1.0%	1	1.3%	1	0.0%	0	0.0%	0
Yes - library	0.8%	8	0.0%	0	0.7%	1	0.8%	0	2.7%	2	0.0%	0	0.6%	1	2.7%	3	0.6%	0	0.0%	0	2.2%	1
Yes - markets	0.2%	2	0.8%	0	1.0%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - meeting family	1.1%	11	4.2%	2	0.0%	0	0.0%	0	4.8%	4	1.3%	2	1.5%	3	0.8%	1	0.0%	0	0.0%	0	0.8%	0
Yes - meeting friends	0.3%	3	1.3%	0	0.0%	0	0.8%	0	1.0%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Yes - museums / art gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - other service (travel agent, estate agent)	0.7%	6	2.8%	1	0.0%	0	2.9%	1	1.5%	1	0.0%	0	0.8%	1	1.4%	1	0.9%	1	0.0%	0	0.0%	0
Yes - personal service (hairdressers, beauty salon)	0.5%	5	0.8%	0	0.8%	1	0.8%	0	1.7%	1	0.0%	0	0.8%	1	0.7%	1	0.0%	0	0.0%	0	0.8%	0
Yes - restaurants	0.9%	9	0.0%	0	2.2%	2	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.1%	3	2.2%	1
Yes - swimming	0.4%	4	0.0%	0	0.0%	0	2.1%	1	1.9%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0
Yes - theatre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visiting services such as banks and other financial institutions	1.7%	16	2.6%	1	0.8%	1	4.3%	1	3.9%	3	0.7%	1	0.0%	0	7.0%	7	0.6%	0	0.0%	0	4.6%	2
Yes - work	5.4%	51	5.5%	2	4.7%	5	3.9%	1	4.2%	3	8.3%	12	10.4%	18	5.8%	6	0.0%	0	0.7%	1	5.0%	2
Yes - Other	0.3%	3	0.0%	0	0.8%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.8%	0
Yes - leisure activity	0.3%	2	0.0%	0	0.7%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.9%	0
Yes - school run	0.2%	2	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
No	67.5%	638	66.7%	24	70.3%	77	66.4%	20	67.0%	50	67.1%	99	66.2%	118	55.3%	57	62.8%	42	80.7%	132	54.1%	20
(Don’t know)	0.9%	9	0.8%	0	1.0%	1	0.0%	0	0.7%	1	0.0%	0	1.3%	2	1.0%	1	1.5%	1	1.6%	3	0.0%	0
Weighted base:		945		36		109		30		75		147		178		103		67		163		36
Sample:		956		96		99		98		96		88		95		95		96		94		99

Q05 When you combine your trip with other activities, where do you normally go? [MR]

Those who link their trip at Q04

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Guildford Town Centre	10.7%	31	59.7%	7	44.4%	13	14.2%	1	14.1%	3	3.8%	2	0.0%	0	0.0%	0	1.7%	0	8.9%	2	10.5%	2
Aldershot town centre	2.6%	8	0.0%	0	2.5%	1	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.7%	7	0.0%	0
Crawley town centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Dorking town centre	2.8%	8	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	2.4%	1	14.9%	7	0.0%	0	0.0%	0	0.0%	0
Farnborough town centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0
Farnham town centre	3.0%	9	5.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.1%	8	0.0%	0
Godalming town centre	9.9%	29	9.2%	1	2.5%	1	55.3%	5	26.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	2	82.6%	13
Horsham town centre	8.4%	25	0.0%	0	0.0%	0	0.0%	0	5.2%	1	0.0%	0	0.0%	0	5.8%	3	87.2%	21	0.0%	0	0.0%	0
Kingston upon Thames town centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0	0.0%	0
Leatherhead town centre	7.5%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	48.8%	22	0.0%	0	0.0%	0	0.0%	0
Weybridge town centre	2.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	9.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	12.1%	36	0.0%	0	2.9%	1	2.9%	0	0.0%	0	62.1%	30	4.5%	3	1.8%	1	0.0%	0	4.0%	1	0.0%	0
Broadbridge Heath Retail Park, Horsham	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farnborough Gate Retail Park, Farnborough	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Godalming Retail Park, Godalming	0.1%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladymead Retail Park, Guildford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lion Retail Park, Woking	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Paddock Retail Park, Weybridge	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solartron Retail Estate, Farnborough	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	17.7%	52	5.5%	1	8.2%	2	0.0%	0	8.6%	2	26.0%	13	50.2%	29	9.2%	4	0.0%	0	4.0%	1	1.7%	0
Trip to the café at store mentioned in Q01	1.7%	5	2.6%	0	3.6%	1	3.6%	0	0.0%	0	0.0%	0	4.5%	3	0.0%	0	1.9%	0	0.0%	0	1.7%	0
Other activity at store mentioned in Q01	11.1%	33	2.6%	0	9.6%	3	0.0%	0	0.0%	0	1.5%	1	33.6%	19	3.7%	2	6.8%	2	22.0%	6	0.0%	0
Cobham	4.3%	13	0.0%	0	23.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	5	0.0%	0	0.0%	0	0.0%	0
Cranleigh	1.7%	5	0.0%	0	0.0%	0	10.1%	1	16.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burpham	1.1%	3	2.6%	0	6.7%	2	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haslemere	2.2%	6	0.0%	0	0.0%	0	0.0%	0	26.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	2.2%	6	12.9%	2	6.7%	2	5.5%	1	2.6%	1	1.5%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.7%	0
Weighted base:		294		12		30		10		24		48		58		45		24		28		16
Sample:		318		32		25		35		33		23		24		39		33		23		51

Q06 In addition to your main food shopping, where do you do most of your household's small scale 'top-up' food shopping? (i.e. the store you visit regularly (2+ times a week to buy bread, milk, etc., on a day-to-day basis)

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda, Lion Retail Park, Woking	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, West Meade, Farnborough	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, 1-2 Station Parade, Ockham Road South, East Horsley, Guildford	0.6%	6	0.0%	0	4.7%	5	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, Lovelace Works, High Street, Ripley, Guildford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Market Town, Village Way, Cranleigh	1.2%	12	0.0%	0	0.0%	0	2.2%	1	3.4%	3	3.8%	7	0.0%	0	0.6%	1	2.2%	2	0.0%	0	0.7%	0
Co-operative Food, 12-14 Madrid Road, Guildford	0.5%	5	10.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Co-operative Food, 48 Woodbridge Hill, Guildford	0.2%	2	0.8%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative, 121b Aldershot Road, Guildford	0.6%	6	0.0%	0	2.5%	3	2.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.7%	0	0.6%	1	0.7%	0
Lidl, East Street, Farnham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.7%	0
M&S Simply Food, Guildford Railway Station, Guildford	0.1%	1	0.0%	0	0.7%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, MERROW BP, 213 EPSOM RD, Guildford	0.6%	6	2.6%	1	4.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, 61-65 High Street, Guildford	0.3%	3	6.8%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Barnes Wallis Drive, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Goldsworth Road, Woking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons Local, 193 High St, Guildford	0.1%	1	1.1%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, 119-121 Collingwood Crescent, Guildford	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, 5-7 Old Palace Road, Guildford	0.2%	2	3.9%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Stag Hill, Guildford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Sainsbury's, 13 Wolseley Walk, Woking	0.7%	7	0.8%	0	0.0%	0	0.9%	0	0.0%	0	3.6%	6	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 148-150 High	0.6%	6	11.9%	4	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Street, Guildford																						
Sainsbury's, 16 South Street, Farnham	0.6%	6	0.9%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0
Sainsbury's, 6-8 Cambridge Walk, Camberley	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, 7 Worthing Road, Horsham	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	6	0.0%	0	0.0%	0
Sainsbury's, Blackwater Valley Road, Camberley	0.4%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	4	0.0%	0
Sainsbury's, Clay Lane, Guildford	0.5%	5	0.8%	0	3.8%	4	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Redding Way, Woking	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	17	2.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stocklund Square, Cranleigh	0.7%	7	0.0%	0	0.0%	0	2.3%	1	6.7%	5	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Swan Centre, Leatherhead	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.8%	13	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Water Lane, Farnham	0.5%	6	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	5	0.0%	0
Sainsbury's, Woolsack Way, Godalming	0.5%	5	1.1%	0	0.0%	0	0.8%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	3
Sainsbury's Local, 124-126 Worplesdon Road, Guildford	0.4%	4	0.8%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	1.4%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.5%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	12.2%	9	0.0%	0	0.0%	0
Tesco, 5 Wellington Avenue, Aldershot	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	16	0.0%	0
Tesco, Ashenden Road, Guildford	0.3%	3	2.3%	1	1.0%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Tesco, Lion Green, Haslemere	1.6%	16	0.0%	0	0.0%	0	0.0%	0	18.2%	15	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	1	0.0%	0
Tesco, Oxshott Road, Leatherhead	0.1%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 7-11 Bridge Street, Guildford	0.4%	4	1.6%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.8%	0
Tesco Express, Guildford Rd, Guildford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Waitrose, 1 Goldsworth Park Centre, Woking	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 11-14 Bridge Street, Godalming	1.3%	13	0.0%	0	0.0%	0	6.2%	2	4.3%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	16.8%	6

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Waitrose, 16-18 Between Streets, Cobham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.8%	1	1.4%	1	0.7%	0	0.0%	0	0.0%	0
Waitrose, 18 Pirie's Place, Horsham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	1.7%	1	0.0%	0	0.0%	0
Waitrose, 60 Station Approach, West Byfleet	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	2.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, 62-66 High Street, Weybridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, The Hart, Farnham	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	6	0.0%	0
Internet	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.6%	1	0.0%	0
Budgens, Bramley Service Station, High Street, Bramley	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, Parklands, Railton Road, Guildford	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, Rowledge, Farnham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Budgens, Station Approach, Virginia Water	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, Vanners Parade, High Road, Byfleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op Welcome, Middle Street, Shere, Guildford	0.2%	2	0.0%	0	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, 8 High Street, Great Bookham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Ash Street, Ash	0.5%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Co-operative Food, Church Road, Milford, Godalming	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0
Co-operative Food, Church Street, Rudgwick	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0
Co-operative Food, Cobb House, Oyster Lane, Byfleet	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Farnborough Road, Farnham	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Co-operative Food, Fitzalan Road, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Co-operative Food, Green Lane, Addlestone	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Guildford Road, Woking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Lion Green, Shottermill, Haslemere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, Marshal	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Parade, Coldharbour Road, Pyrford																						
Co-operative Food, Martletts Corner, Church Street, Rudgwick, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Co-operative Food, North Lane, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-operative Food, North Parade, Warnham Road, Horsham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0
Co-operative Food, Queens Road, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-operative Food, Southwater Village, Shopping Centre, Southwater	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Co-operative Food, St. Johns Road, St. Johns, Woking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, St. Johns Street, Farncombe	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1
Co-operative Food, The Broadway, Newhaw, Nr Addlestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-operative Food, The Square, Bagshot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Templer Avenue, Farnborough	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Green Lane, Farncombe, Godalming	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0
Costcutter, Hale Road, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Duffy's Budgens, Guildford Road, Lightwater	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	3.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Duffy's Budgens, Wharf Road, Ash Vale	0.6%	6	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	5	0.0%	0
Iceland, Victoria Road, Aldershot	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	5	0.0%	0
Lidl, North Street, Leatherhead	0.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Vincent Lane, Dorking	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0
Lidl, Wellington Centre, Aldershot	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Local shops, Abinger Hammer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Local shops, Ash	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Bellfields	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Guildford Household Survey for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Local shops, Bookham	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	6	0.0%	0	0.0%	0	0.0%	0
Local shops, Boxgrove	0.3%	3	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Bramley	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Byfleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Chertsey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Chiddingfold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Chilworth	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Cranleigh	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Local shops, Dorking	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4	0.6%	0	0.0%	0	0.0%	0
Local shops, East Horsley	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Elstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Epsom	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Ewhurst	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Farncombe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Local shops, Farnham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Local shops, Fetcham	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	11	0.0%	0	0.0%	0	0.0%	0
Local shops, Godalming	0.4%	4	0.0%	0	0.0%	0	0.9%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	2
Local shops, Great Bookham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0
Local shops, Guildford	0.4%	4	4.1%	2	1.7%	2	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Haslemere	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Horsell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Horsham	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	6	0.0%	0	0.0%	0
Local shops, Leatherhead	0.2%	2	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Milford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Local shops, Ockley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Ripley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Rowledge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Rudgwick	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Local shops, Send	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Shalford	0.1%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Shamley Green	0.1%	1	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Staines-upon-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Sunningdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Tongham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Warnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Local shops, Woking	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Wonersh	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Londis, New Road, Chilworth	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Food Outlet, Union Street, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
M&S Simply Food BP, Kingston Road, Leatherhead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Warrens Yard, High Street,	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Cranleigh																						
Marks & Spencer, Station Concourse, South Waterloo	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Swan Walk, Horsham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Morrisons, Alexander Road, Aldershot	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Morrisons, Bell Street, Reigate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, New Haw Road, Addlestone	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa Local, Harvest Energy Service Station, Guildford	0.1%	1	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa Local, The Street, Tongham, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Nisa, High Street, Bramley	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Alford Road, Cranleigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Brox Road, Ottershaw	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Kingston Road, Leatherhead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
One Stop, Tangmere Road, Chichester	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peacocks, Collingwood Crescent, Guildford	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peaslake Village Stores, Peaslake Lane, Guildford	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier Stores, Foresters House, Foresters Lodge, Newdigate, Dorking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Ash Road, Aldershot	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0
Sainsbury's Local, Ashcombe Parade, Kingfield Road, Woking	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Cobham Road, Fetcham	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	5	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, High Street, Cobham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Temple Market, Queens Road, Weybridge	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Waterloo Road, Waterloo, London	0.1%	1	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street,	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dorking																						
Sainsbury's, New Zealand Avenue, Walton-on-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Queensmead, Farnborough	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	13	0.0%	0
Spar, Lower Eashing, Godalming	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Spar, The Green, Elstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Esso Express, Old Woking Road, West Byfleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Esso Express, Redkiln Way, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Tesco Express, Guildford Road, Woking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Lysons Avenue, Ash Vale	1.6%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	17	0.0%	0
Tesco Express, North Street, Midhurst	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Portsmouth Road, Godalming	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Tesco Express, Queens Road, Weybridge	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Ridgway Road, Farnham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Tesco Extra, Reigate Road, Hookwood, Horley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Ashley Centre, Epsom	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, High Street, Dorking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Waitrose, London Road, Sunningdale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Two Rivers Retail Park, Mustard Mill Road, Staines-upon-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, West Street, Haslemere	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	5.3%	53	1.9%	1	3.9%	4	5.4%	2	0.7%	1	2.5%	4	5.7%	11	3.5%	4	3.1%	2	13.9%	24	3.3%	1
(Don't do this type of shopping)	35.3%	354	42.5%	16	53.8%	60	52.8%	16	32.3%	26	45.2%	77	22.8%	42	33.3%	36	37.7%	27	21.4%	37	48.5%	18
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q07 Of all the money you spend on food and household groceries, what share goes on your main food shopping?
Those who do top-up shopping at Q06

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
1-10%	0.4%	3	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	3	0.0%	0	0.0%	0
11-20%	0.3%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
21-30%	1.0%	6	0.0%	0	2.1%	1	0.0%	0	3.8%	2	0.0%	0	0.0%	0	1.4%	1	3.7%	2	0.0%	0	3.5%	1
31-40%	1.3%	8	3.6%	1	3.8%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.2%	3	0.0%	0	1.0%	1	0.0%	0
41-50%	3.9%	25	3.4%	1	5.3%	3	7.2%	1	1.1%	1	5.0%	5	5.0%	7	4.6%	3	3.3%	1	1.5%	2	9.2%	2
51-60%	5.1%	33	6.6%	1	12.4%	6	5.2%	1	2.1%	1	4.1%	4	0.8%	1	17.3%	12	5.9%	3	2.3%	3	1.4%	0
61-70%	12.6%	82	8.9%	2	3.2%	2	6.6%	1	17.7%	10	15.5%	14	11.8%	17	6.6%	5	10.7%	5	19.1%	26	6.5%	1
71-80%	24.7%	160	28.2%	6	15.4%	8	22.0%	3	30.3%	16	30.1%	28	16.8%	24	29.4%	21	13.7%	6	30.5%	41	30.1%	6
81-90%	16.6%	107	14.2%	3	14.7%	8	27.9%	4	14.6%	8	12.7%	12	28.7%	41	9.5%	7	25.0%	11	7.6%	10	20.1%	4
91-99%	3.7%	24	3.0%	1	2.9%	2	10.6%	2	5.1%	3	5.1%	5	3.0%	4	2.5%	2	2.4%	1	3.4%	5	4.5%	1
100%	1.3%	9	0.0%	0	2.1%	1	0.0%	0	2.6%	1	2.0%	2	1.0%	1	3.9%	3	0.0%	0	0.0%	0	0.0%	0
(Don't know)	27.3%	177	28.5%	6	33.1%	17	18.8%	3	22.5%	12	22.3%	21	31.5%	45	20.8%	15	23.3%	10	32.0%	43	24.6%	5
(Refused)	1.9%	12	2.2%	0	3.6%	2	1.7%	0	0.0%	0	3.1%	3	0.8%	1	0.0%	0	4.3%	2	2.6%	3	0.0%	0
Mean:		*75.89*		*73.71*		*70.50*		*80.27*		*77.51*		*77.00*		*80.25*		*71.98*		*68.65*		*76.42*		*75.59*
Weighted base:		648		22		51		14		54		93		143		72		44		135		19
Sample:		607		55		50		49		61		63		65		67		65		74		58

Q08 I would now like to ask you some questions about your non-food shopping habits/preferences - In which ONE town centre, freestanding store or retail park do you do most of your household's shopping for clothing and footwear (mens, womens, childrens and baby - NOT including sports clothing and footwear)?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury's, Clay Lane, Burpham, Guildford, Surrey	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham (includes Halfords, Homebase, Carpetright)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	5	0.0%	0	0.0%	0
Farnborough Gate Retail Park, Farnborough	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	14	0.0%	0
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	0.3%	3	1.6%	1	0.0%	0	0.8%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Paddock Retail Park, Sopwith Way, Brooklands, Weybridge (includes Argos, Currys, M&S, Tesco Extra, Mothercare)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Addlestone	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldershot	4.0%	40	2.1%	1	1.7%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.6%	37	0.0%	0
Basingstoke	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	3.2%	6	0.7%	0
Brighton	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Camberley	3.4%	34	0.0%	0	1.5%	2	2.6%	1	1.0%	1	5.7%	10	2.9%	5	0.0%	0	0.0%	0	9.2%	16	0.0%	0
Chobham	0.2%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Cobham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cranleigh	0.2%	2	0.0%	0	0.0%	0	0.8%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	1.4%	14	0.0%	0	0.0%	0	0.8%	0	0.8%	1	0.0%	0	0.0%	0	5.3%	6	11.0%	8	0.0%	0	0.0%	0
Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Dorking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Farnborough	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Farnham	1.8%	18	1.1%	0	0.0%	0	0.8%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	15	0.0%	0
Godalming	0.9%	9	0.8%	0	0.0%	0	7.7%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	7.8%	3

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Guildford	37.0%	371	77.6%	29	80.7%	90	66.9%	20	55.2%	44	30.2%	51	10.1%	19	37.8%	41	7.5%	5	25.7%	44	74.5%	27
Haslemere	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	5.3%	54	0.0%	0	0.0%	0	0.8%	0	2.8%	2	0.0%	0	0.0%	0	7.6%	8	60.6%	43	0.0%	0	0.0%	0
Kingston	2.7%	27	0.0%	0	1.4%	2	2.2%	1	1.0%	1	2.8%	5	5.8%	11	7.9%	8	0.0%	0	0.0%	0	0.0%	0
Leatherhead	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	12	0.0%	0	0.0%	0	0.0%	0
London	0.8%	8	0.0%	0	0.7%	1	0.8%	0	1.3%	1	0.5%	1	1.2%	2	1.4%	1	1.8%	1	0.0%	0	0.0%	0
Portsmouth	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Reading	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staines	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	8.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sutton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	3.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weybridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Windlesham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Windsor	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking	13.4%	135	3.0%	1	3.3%	4	0.8%	0	0.0%	0	32.9%	56	39.0%	73	0.0%	0	0.0%	0	0.6%	1	0.8%	0
Internet / Catalogue	7.4%	75	5.0%	2	5.0%	6	8.8%	3	15.3%	12	3.4%	6	12.7%	24	6.2%	7	5.9%	4	5.5%	9	6.5%	2
Abroad	0.2%	2	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Asda, Portland Road, Havant, Waterlooville	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brooklands, Weybridge	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	1.9%	4	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Brookwood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Eastbourne	0.1%	1	0.0%	0	0.0%	0	0.8%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	6	0.0%	0	0.0%	0	0.0%	0
Great Bookham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Gunwharf Quays, Portsmouth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hastings	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Lakeside Retail Park, Thurrock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Leicester	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manchester	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newbury	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0
Petersfield	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Blackwater Valley Road, Camberley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Trafford Centre, Manchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Waterlooville	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wellington Centre, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
(Don't know)	4.1%	42	1.6%	1	0.7%	1	0.8%	0	2.4%	2	6.7%	11	4.4%	8	2.0%	2	3.6%	3	6.7%	11	6.4%	2
(Don't do this type of shopping)	3.4%	34	4.0%	2	3.0%	3	3.6%	1	0.7%	1	7.2%	12	3.1%	6	3.7%	4	0.8%	1	2.6%	4	2.5%	1
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q09 What do you like about (LOCATION MENTIONED AT Q08)? [MR]
Those who mentioned a location at Q08

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Attractive environment	9.1%	77	14.5%	5	7.4%	8	23.3%	6	8.1%	5	14.0%	20	3.4%	5	9.2%	9	15.6%	10	3.8%	6	14.6%	5
Cinema	0.4%	4	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0
Cleanliness	0.7%	6	2.4%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	11.7%	4
Close to friends / family	2.0%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	11.6%	11	8.5%	5	0.0%	0	0.0%	0
Close to home	29.9%	255	33.5%	11	39.1%	40	27.0%	7	26.8%	18	23.7%	33	38.9%	58	16.2%	15	48.7%	31	21.7%	32	32.3%	10
Close to work / en route to work	3.1%	27	2.2%	1	0.0%	0	1.1%	0	5.2%	3	0.0%	0	1.5%	2	1.9%	2	4.6%	3	9.8%	14	3.2%	1
Compact	3.6%	30	5.6%	2	4.0%	4	3.8%	1	3.9%	3	4.2%	6	0.8%	1	4.7%	4	2.6%	2	4.8%	7	2.1%	1
Easily accessible by foot / cycle	1.4%	12	4.1%	1	0.7%	1	5.5%	1	1.2%	1	1.4%	2	0.7%	1	1.5%	1	0.0%	0	1.4%	2	3.3%	1
Friendly atmosphere	2.2%	19	6.4%	2	0.7%	1	6.0%	2	4.1%	3	0.7%	1	1.4%	2	3.6%	3	3.4%	2	1.5%	2	2.1%	1
Good and/ or free car parking	6.6%	56	0.9%	0	1.6%	2	5.3%	1	8.7%	6	8.9%	13	5.5%	8	3.8%	4	5.4%	3	12.8%	19	3.0%	1
Good bus service / accessible public transport	1.1%	10	0.9%	0	1.6%	2	6.7%	2	1.9%	1	0.5%	1	0.0%	0	1.4%	1	0.0%	0	0.9%	1	4.0%	1
Good disabled access	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Good prices	2.8%	24	8.9%	3	3.6%	4	0.9%	0	1.9%	1	8.4%	12	0.0%	0	1.0%	1	0.0%	0	2.2%	3	0.0%	0
Good range of chain / well known stores	18.0%	153	14.0%	5	18.9%	19	16.4%	4	30.1%	20	16.1%	23	19.7%	29	24.8%	24	6.1%	4	14.9%	22	13.9%	4
Good range of independent stores	9.5%	81	4.9%	2	7.1%	7	14.7%	4	16.8%	11	5.5%	8	15.2%	22	4.3%	4	9.0%	6	8.8%	13	12.4%	4
Habit/ always used it	3.5%	30	4.1%	1	6.3%	6	6.7%	2	1.2%	1	6.9%	10	0.0%	0	4.1%	4	6.8%	4	0.7%	1	2.1%	1
Indoor shopping malls / arcades	2.2%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	10.3%	15	0.0%	0	2.6%	2	0.8%	1	0.0%	0
Large shopping area	0.9%	8	0.0%	0	3.1%	3	1.1%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0	1.4%	2	1.7%	1
Market	0.6%	5	0.0%	0	1.5%	2	1.1%	0	0.0%	0	0.0%	0	1.6%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Not overcrowded / not too busy	0.9%	8	1.8%	1	0.0%	0	3.0%	1	1.2%	1	0.0%	0	0.7%	1	0.0%	0	4.7%	3	0.9%	1	0.9%	0
Opening hours	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Part of an overall day out	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.7%	1	0.0%	0
Pedestrianised	1.3%	11	3.3%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.8%	2	9.2%	6	0.8%	1	1.2%	0
Range of goods available	6.7%	57	5.8%	2	14.3%	15	12.2%	3	1.8%	1	1.0%	1	3.7%	6	5.8%	6	9.5%	6	9.4%	14	11.2%	3
Restaurant / cafes	1.4%	12	0.0%	0	2.8%	3	0.9%	0	2.9%	2	0.0%	0	1.6%	2	1.0%	1	0.9%	1	1.7%	3	0.0%	0
Safe shopping environment	0.6%	5	0.0%	0	3.6%	4	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.7%	1
Particular store (Write in name of retailer)	2.9%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4	0.0%	0	0.7%	1	0.9%	1	13.5%	20	0.0%	0
Other	2.6%	22	6.3%	2	0.0%	0	2.0%	1	3.9%	3	3.2%	4	0.8%	1	4.6%	4	0.7%	0	4.2%	6	0.9%	0
Has everything	0.4%	3	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	1	0.0%	0	0.8%	1	0.0%	0
Has park and ride	0.6%	5	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.6%	2	0.0%	0	0.0%	0	1.7%	1
It is all on one level	0.7%	6	0.0%	0	1.1%	1	0.9%	0	2.8%	2	0.0%	0	0.7%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0
It is convenient	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	10	1.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Lewis	0.5%	4	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.6%	1	0.7%	1	1.7%	2	0.6%	0	0.0%	0	0.0%	0
Marks and Spencers	1.0%	8	0.0%	0	1.5%	2	0.9%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1	0.0%	0	2.8%	4	1.7%	1
Nothing / very little	7.3%	62	13.4%	4	10.2%	10	14.5%	4	11.6%	8	6.5%	9	7.0%	10	5.7%	5	2.3%	1	6.0%	9	3.6%	1

Guildford Household Survey
for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Online shopping is easier	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
They deliver	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	2.0%	17	0.9%	0	0.7%	1	0.9%	0	4.9%	3	3.0%	4	0.8%	1	2.9%	3	0.0%	0	2.3%	3	1.7%	1
Good choice of shops	2.3%	20	0.0%	0	3.0%	3	0.0%	0	0.0%	0	1.5%	2	1.5%	2	3.3%	3	0.0%	0	5.8%	8	1.7%	1
Weighted base:		852		34		102		26		65		140		148		95		63		147		31
Sample:		855		87		91		86		89		79		82		87		90		81		83

Q10 Where do you normally do most of your household's shopping for CDs & DVDs, (excluding video games)?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury,s Bridge Way, Cobham, Surrey	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Clay Lane, Burpham, Guildford, Surrey	0.1%	1	0.8%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.7%	1	3.6%	3	0.0%	0	0.0%	0
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Addlestone	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldershot	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	7	0.0%	0
Camberley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Chobham	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cobham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cranleigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	0	0.0%	0	0.0%	0
Farnborough	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farnham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.7%	0
Frimley	0.1%	1	1.1%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Godalming	0.5%	5	0.0%	0	0.7%	1	2.5%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	3
Guildford	7.3%	73	16.3%	6	13.3%	15	14.8%	4	11.0%	9	3.7%	6	1.2%	2	7.8%	8	0.0%	0	9.9%	17	12.7%	5
Haslemere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.3%	2	30.0%	21	0.0%	0	0.0%	0
Kingston	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leatherhead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
London	0.2%	2	0.0%	0	0.8%	1	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Staines	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	9	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / Catalogue	36.9%	370	30.2%	11	33.8%	38	21.5%	7	29.1%	23	43.4%	74	36.6%	68	39.3%	42	31.8%	22	43.4%	75	28.3%	10
Bramley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, South Street, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury's, Stocklund Square, Cranleigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Water Lane, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Extra, The Meadows, Marshall Road, Camberley, Sandhurst	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco, Ashenden Road, Guildford	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Wellington Avenue, Aldershot	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0
(Don't know)	9.4%	94	2.6%	1	3.5%	4	2.6%	1	22.4%	18	19.2%	33	13.3%	25	2.0%	2	1.3%	1	5.7%	10	1.6%	1
(Don't do this type of shopping)	34.9%	350	48.0%	18	46.5%	52	55.9%	17	28.7%	23	27.5%	47	28.1%	52	43.9%	47	32.7%	23	30.8%	53	47.2%	17
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q11 Where do you normally do most of your household's shopping for audio visual, photographic, computer items (such as stereos, radios, TVs, software, cameras, kindles, ipads, telephones, etc.)?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury,s Bridge Way, Cobham, Surrey	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Clay Lane, Burpham, Guildford, Surrey	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham (includes Halfords, Homebase, Carpetright)	0.7%	7	0.0%	0	2.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	4	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.8%	1	0.0%	0	0.0%	0
Farnborough Gate Retail Park, Farnborough	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	15.8%	27	0.0%	0
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	7.7%	77	13.5%	5	25.6%	29	29.3%	9	13.0%	10	6.1%	10	0.5%	1	2.0%	2	0.7%	0	3.2%	6	12.5%	5
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	1.2%	12	2.1%	1	0.0%	0	0.0%	0	0.7%	1	5.6%	10	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Paddock Retail Park, Sopwith Way, Brooklands, Weybridge (includes Argos, Currys, M&S, Tesco Extra, Mothercare)	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	7.1%	13	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Woodbridge Road, Guildford (includes PC World, Currys)	1.9%	19	6.9%	3	2.4%	3	0.8%	0	6.0%	5	0.6%	1	0.5%	1	0.6%	1	0.0%	0	2.6%	4	3.4%	1
Addlestone	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	6	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Aldershot	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	7	0.0%	0
Bracknell	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Camberley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.4%	2	0.0%	0
Cobham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Cranleigh	0.1%	1	0.0%	0	0.0%	0	0.8%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	5.1%	5	12.2%	9	0.0%	0	0.0%	0
Dorking	0.2%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Farnborough	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0	2.1%	4	0.0%	0
Farnham	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	6.8%	12	1.5%	1
Godalming	0.2%	2	0.0%	0	0.0%	0	2.0%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1
Guildford	10.4%	104	18.4%	7	27.6%	31	8.6%	3	18.7%	15	3.0%	5	2.0%	4	15.4%	17	0.0%	0	7.5%	13	29.8%	11
Horsham	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4	25.3%	18	0.0%	0	0.0%	0
Kingston	3.8%	38	0.8%	0	1.7%	2	5.7%	2	6.1%	5	2.8%	5	3.8%	7	15.5%	17	0.0%	0	0.0%	0	3.3%	1
Leatherhead	0.4%	4	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0
London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reading	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Southampton	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Staines	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	4.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weybridge	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	2.9%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Woking	4.6%	47	3.4%	1	0.0%	0	0.0%	0	0.8%	1	22.4%	38	3.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / Catalogue	18.3%	184	17.7%	7	13.4%	15	19.3%	6	29.9%	24	12.9%	22	15.8%	29	18.4%	20	26.6%	19	20.9%	36	18.5%	7
Bluewater Shopping Centre, Greenhithe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Bramley	0.1%	1	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brooklands, Weybridge	0.3%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Byfleet	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Horsley	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Gatwick Airport, Horley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Havant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Reigate Road, Ewell, Epsom	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Kingston-upon-Thames	0.1%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Onslow	0.1%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oxford Street, London	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Petersfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portfield Retail Park, Chichester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Redding Way, Woking	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Salisbury	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	14.5%	145	12.7%	5	2.5%	3	3.4%	1	8.6%	7	20.5%	35	20.3%	38	9.5%	10	5.1%	4	23.8%	41	5.5%	2
(Don't do this type of shopping)	18.8%	189	20.5%	8	22.0%	24	23.0%	7	10.0%	8	20.9%	35	26.5%	49	17.1%	18	17.3%	12	10.8%	19	20.6%	8
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q12 Where do you normally do most of your household's shopping for all other electrical goods including domestic electrical appliances (such as irons, kettles, fans, coffee makers, food mixers), white goods (fridges, freezers, dishwashers) and smaller etc)?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury,s Bridge Way, Cobham, Surrey	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Clay Lane, Burpham, Guildford, Surrey	0.2%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	6	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham (includes Halfords, Homebase, Carpetright)	0.9%	9	0.0%	0	0.0%	0	1.8%	1	0.8%	1	0.0%	0	0.0%	0	0.6%	1	9.5%	7	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	3.3%	2	0.0%	0	0.0%	0
Farnborough Gate Retail Park, Farnborough	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	23.0%	40	0.0%	0
Godalming Retail Park, Godalming	0.1%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	10.9%	109	26.3%	10	25.3%	28	41.4%	13	13.1%	11	7.1%	12	2.7%	5	2.4%	3	7.6%	5	10.7%	18	13.3%	5
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	4.3%	43	2.9%	1	9.8%	11	0.0%	0	0.0%	0	13.3%	23	2.5%	5	0.0%	0	0.0%	0	2.0%	3	1.5%	1
Paddock Retail Park, Sopwith Way, Brooklands, Weybridge (includes Argos, Currys, M&S, Tesco Extra, Mothercare)	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	4.8%	9	0.6%	1	0.7%	0	0.6%	1	1.2%	0
Woodbridge Road, Guildford (includes PC World, Currys)	2.6%	26	8.6%	3	1.5%	2	0.8%	0	10.7%	9	1.7%	3	1.9%	4	2.2%	2	0.0%	0	1.5%	3	3.7%	1
Addlestone	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	10.1%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldershot	1.2%	12	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	11	0.0%	0
Ash	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Basingstoke	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Bracknell	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camberley	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.6%	1	0.0%	0	1.4%	2	0.0%	0
Cobham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh	0.1%	1	0.0%	0	0.0%	0	0.8%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	6	11.2%	8	0.0%	0	0.0%	0
Dorking	0.6%	6	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	6	0.0%	0	0.0%	0	0.0%	0
Farnborough	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.6%	4	0.0%	0
Farnham	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	12	7.8%	3
Godalming	1.0%	10	0.0%	0	0.0%	0	3.4%	1	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.7%	7
Guildford	9.4%	95	26.4%	10	31.6%	35	12.0%	4	19.4%	16	3.4%	6	3.4%	6	6.7%	7	0.0%	0	3.2%	6	15.4%	6
Haslemere	0.3%	3	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	2.3%	23	0.0%	0	0.7%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	2.8%	3	25.9%	18	0.0%	0	0.0%	0
Kingston	3.6%	36	0.0%	0	1.7%	2	2.0%	1	1.4%	1	3.9%	7	3.0%	5	17.3%	19	0.0%	0	0.0%	0	4.1%	2
Leatherhead	1.2%	12	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	10	0.0%	0	0.0%	0	0.0%	0
London	0.1%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Reading	0.2%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill/Reigate	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.0%	0	0.0%	0	0.0%	0
Southampton	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Walton-on-Thames	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weybridge	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	14	2.4%	5	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Woking	3.8%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.5%	33	2.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / Catalogue	16.4%	164	12.4%	5	12.4%	14	14.1%	4	26.4%	21	8.3%	14	25.4%	47	12.2%	13	22.3%	16	15.2%	26	10.9%	4
Bluewater Shopping Centre, Greenhithe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Boxgrove	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bramley	0.4%	4	0.9%	0	0.0%	0	2.5%	1	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brooklands, Weybridge	0.8%	8	1.1%	0	1.0%	1	0.0%	0	0.0%	0	0.6%	1	3.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Byfleet	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
East Horsley	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farncombe	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Fleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Gatwick Airport, Horley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Great Bookham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0
Kingston-upon-Thames	0.1%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Knaphill	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Molesey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oxford Street, London	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Kiln Lane, Epsom	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Water Lane, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Sainsbury's, Woolsack Way, Godalming	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tanbridge Retail Park, Horsham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(Don't know)	11.3%	113	7.4%	3	1.1%	1	6.7%	2	10.7%	9	14.8%	25	13.3%	25	12.5%	13	5.0%	4	16.7%	29	6.5%	2
(Don't do this type of shopping)	10.6%	107	12.3%	5	10.0%	11	9.3%	3	4.1%	3	15.2%	26	13.7%	25	7.3%	8	9.7%	7	7.9%	14	13.9%	5
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q13 Where do you normally do most of your household's shopping for books (incl. dictionaries, encyclopedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury,s Bridge Way, Cobham, Surrey	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Clay Lane, Burpham, Guildford, Surrey	0.2%	2	0.8%	0	0.0%	0	0.9%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	0.1%	1	1.6%	1	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wey Retail Park, Royston Road, Byfleet, West Byfleet, Surrey (includes Halfords, Carpet Right/Paul Simon, (previously MFI))	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Addlestone	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	5	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Aldershot	3.1%	31	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.3%	30	0.0%	0
Camberley	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	10	3.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh	1.0%	10	0.0%	0	0.0%	0	4.4%	1	9.4%	7	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Crawley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.5%	2	0.0%	0	0.0%	0
Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Dorking	1.0%	10	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	10	0.0%	0	0.0%	0	0.0%	0
Farnborough	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.8%	0
Farnham	2.0%	20	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.6%	20	0.0%	0
Godalming	3.4%	34	0.8%	0	0.0%	0	20.4%	6	12.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	47.6%	18
Guildford	13.4%	135	58.1%	22	49.4%	55	41.5%	13	13.0%	10	5.4%	9	2.7%	5	9.7%	10	0.0%	0	3.5%	6	11.2%	4
Haslemere	1.0%	10	0.0%	0	0.0%	0	0.0%	0	12.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	4.2%	42	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	4.9%	5	51.0%	36	0.0%	0	0.0%	0
Kingston	1.4%	14	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	1.9%	4	9.1%	10	0.0%	0	0.0%	0	0.0%	0
Leatherhead	2.1%	21	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.0%	19	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
London	0.3%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Reading	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redhill/Reigate	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0
Staines	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weybridge	2.2%	22	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	10.7%	20	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Woking	8.0%	80	0.9%	0	2.6%	3	0.0%	0	0.0%	0	24.4%	41	18.5%	34	0.0%	0	0.0%	0	0.6%	1	0.7%	0
Internet / Catalogue	29.5%	295	22.3%	8	19.3%	21	18.0%	5	35.5%	28	29.4%	50	30.9%	58	28.6%	31	29.3%	21	37.8%	65	20.6%	8
Chichester	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0
Gatwick Airport, Horley	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newdigate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Ripley	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Rudgwick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Sainsbury's, Woolsack Way, Godalming	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0
Tesco, Lion Green, Haslemere	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Wellington Avenue, Aldershot	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
West Byfleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	6.4%	64	2.7%	1	12.9%	14	1.2%	0	9.0%	7	16.1%	27	3.4%	6	0.7%	1	0.0%	0	3.5%	6	2.4%	1
(Don't do this type of shopping)	15.0%	151	11.6%	4	10.3%	12	8.2%	2	6.8%	5	16.8%	28	20.1%	37	7.3%	8	12.5%	9	22.7%	39	14.8%	5
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q14 Where do you normally do most of your household's shopping for games & toys; pets and pet products; hobby items; sport, camping goods and bicycles; and musical instruments?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury,s Bridge Way, Cobham, Surrey	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	4	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham (includes Halfords, Homebase, Carpetright)	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Farnborough Gate Retail Park, Farnborough	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Godalming Retail Park, Godalming	0.4%	4	0.0%	0	0.0%	0	0.9%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	0.4%	4	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	1.0%	10	2.1%	1	0.0%	0	0.9%	0	0.0%	0	4.4%	8	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redding Way, Knaphill, Woking, Surrey (includes Sainsbury's/Homebase)	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solartron Retail Estate, Farnborough (includes B&Q, DFS, Paul Simon, Carpetright, Allied Carpets, Maplin, The sleep Depot, Pets at Home)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.8%	1	0.0%	0
Wey Retail Park, Royston Road, Byfleet, West Byfleet, Surrey (includes Halfords, Carpet Right/Paul Simon, (previously MFI))	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Guildford Household Survey for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Addlestone	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Aldershot	2.3%	23	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	23	0.0%	0
Brighton	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Camberley	1.6%	16	0.0%	0	0.0%	0	2.6%	1	0.0%	0	5.7%	10	1.3%	2	0.0%	0	0.0%	0	2.1%	4	0.0%	0
Chertsy	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chobham	0.1%	1	0.0%	0	1.0%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cobham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Cranleigh	0.6%	6	0.0%	0	0.0%	0	3.1%	1	5.6%	5	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Crawley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0
Dorking	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0
Farnborough	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	4	0.0%	0
Farnham	1.9%	19	0.0%	0	0.7%	1	1.2%	0	0.8%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	9.6%	17	0.0%	0
Godalming	2.6%	26	3.5%	1	1.4%	2	14.0%	4	9.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.0%	11
Guildford	11.4%	114	35.9%	13	33.9%	38	10.3%	3	15.1%	12	8.5%	14	1.8%	3	13.9%	15	0.7%	0	5.7%	10	11.9%	4
Haslemere	1.4%	14	0.0%	0	0.0%	0	0.0%	0	17.9%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	3.5%	35	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.3%	2	45.5%	32	0.0%	0	0.0%	0
Kingston	1.6%	16	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	1.9%	4	11.6%	12	0.0%	0	0.0%	0	0.0%	0
Leatherhead	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	8	0.0%	0	0.0%	0	0.0%	0
London	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Milford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Redhill/Reigate	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Staines	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weybridge	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	19	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Winchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Woking	9.2%	92	3.7%	1	3.7%	4	2.6%	1	1.8%	1	33.1%	56	12.1%	23	2.3%	2	0.0%	0	1.8%	3	0.0%	0
Internet / Catalogue	13.7%	137	12.2%	5	12.9%	14	16.1%	5	15.8%	13	9.2%	16	8.4%	16	21.4%	23	12.7%	9	19.4%	33	10.8%	4
Billinghurst	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bourne Valley Garden Centre, Woodham Park Road, Addlestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Road Retail Park, Brighton Road, Redhill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Byfleet	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Horsley	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Farnham Retail Park, Guildford Road, Farnham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Fetcham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Frensham Garden Centre, The Reeds, Frensham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liphook	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lyne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Onslow	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Puttenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rushmoor	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Blackwater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0

Guildford Household Survey
for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Valley Road, Camberley																						
Sainsbury's, High Street, Dorking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Swan Centre, Leatherhead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Woolsack Way, Godalming	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0
Tesco, Wellington Avenue, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Wellington Centre, Aldershot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
(Don't know)	10.6%	106	3.8%	1	6.7%	7	3.4%	1	6.6%	5	12.6%	21	24.6%	46	4.2%	5	1.4%	1	9.7%	17	3.7%	1
(Don't do this type of shopping)	28.0%	280	35.9%	13	36.4%	41	39.3%	12	19.9%	16	23.8%	40	24.5%	46	25.4%	27	27.6%	19	30.5%	52	35.5%	13
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q15 Where do you normally do most of your household's shopping for personal/luxury goods including jewellery, china, glass, medicine and cosmetics?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury's, Clay Lane, Burpham, Guildford, Surrey	0.3%	3	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Addlestone Extra, Addlestone	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Brooklands EXTRA, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	3	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham (includes Halfords, Homebase, Carpetright)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
County Oak Retail Park, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Godalming Retail Park, Godalming	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Addlestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Aldershot	4.0%	40	1.1%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.7%	39	0.0%	0
Bracknell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camberley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chobham	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cobham	1.5%	15	0.0%	0	0.7%	1	0.0%	0	0.0%	0	5.7%	10	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0
Cranleigh	1.0%	10	0.0%	0	0.0%	0	4.2%	1	10.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.9%	1	2.0%	1	0.0%	0	0.0%	0
Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	0	0.0%	0	0.0%	0
Dorking	0.8%	8	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	8	0.0%	0	0.0%	0	0.0%	0
Farnborough	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Farnham	2.2%	22	0.0%	0	2.4%	3	0.8%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	16	3.4%	1
Godalming	2.7%	27	0.0%	0	0.0%	0	11.7%	4	8.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	44.7%	16
Guildford	22.8%	229	57.6%	22	64.0%	71	41.5%	13	23.3%	19	26.1%	44	6.1%	11	15.0%	16	5.8%	4	11.8%	20	23.2%	9
Haslemere	1.1%	11	0.0%	0	0.0%	0	0.0%	0	14.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	4.5%	45	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	4.1%	4	56.3%	40	0.0%	0	0.0%	0
Hounslow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Kingston	5.0%	50	0.0%	0	1.8%	2	5.1%	2	0.7%	1	1.6%	3	6.4%	12	15.9%	17	0.0%	0	8.3%	14	0.7%	0
Leatherhead	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	14	0.0%	0	0.0%	0	0.0%	0
London	2.0%	20	0.0%	0	0.0%	0	4.0%	1	2.1%	2	2.0%	3	4.3%	8	1.6%	2	2.8%	2	0.6%	1	2.3%	1
Milford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Reading	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0

Guildford Household Survey
for Planning Perspectives

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Redhill/Reigate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Staines	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weybridge	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	7.7%	14	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Windsor	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking	9.7%	97	2.1%	1	1.9%	2	0.9%	0	0.0%	0	29.8%	51	22.9%	43	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Internet / Catalogue	3.8%	39	4.6%	2	2.1%	2	2.1%	1	4.9%	4	2.8%	5	4.0%	7	8.1%	9	3.0%	2	3.4%	6	2.6%	1
Abroad	0.2%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Asda, West Meade, Farnborough	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Brooklands, Weybridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burpham	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chiddingfold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Horsley	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Fetcham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Great Bookham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Horsley	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingston-upon-Thames	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Petersfield	0.7%	7	0.0%	0	0.0%	0	0.0%	0	9.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pyrford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Midhurst Road, Liphook	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Redding Way, Woking	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Send	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shalford	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Byfleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	7.3%	73	5.7%	2	4.0%	4	2.6%	1	4.9%	4	6.8%	12	2.4%	5	7.0%	8	2.4%	2	20.5%	35	2.6%	1
(Don't do this type of shopping)	20.5%	206	28.1%	11	16.7%	19	22.4%	7	15.5%	12	22.9%	39	25.8%	48	15.3%	16	19.0%	13	19.4%	33	19.6%	7
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q16 Where do you normally do most of your household's shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Tesco Extra, Addlestone Extra, Addlestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham (includes Halfords, Homebase, Carpetright)	1.8%	18	0.0%	0	1.0%	1	2.0%	1	0.0%	0	1.1%	2	0.0%	0	0.7%	1	19.0%	13	0.0%	0	0.7%	0
County Oak Retail Park, Crawley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0
Farnborough Gate Retail Park, Farnborough	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	11	0.8%	1	0.0%	0	0.0%	0	2.8%	5	0.0%	0
Godalming Retail Park, Godalming	0.1%	1	0.0%	0	0.0%	0	0.8%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	5.7%	57	8.4%	3	15.9%	18	16.2%	5	9.2%	7	3.5%	6	2.5%	5	5.4%	6	1.5%	1	2.2%	4	6.4%	2
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	0.5%	5	0.0%	0	1.8%	2	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Paddock Retail Park, Sopwith Way, Brooklands, Weybridge (includes Argos, Currys, M&S, Tesco Extra, Mothercare)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Redding Way, Knaphill, Woking, Surrey (includes Sainsbury's/Homebase)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solartron Retail Estate, Farnborough (includes B&Q, DFS, Paul Simon, Carpetright, Allied Carpets, Maplin, The sleep Depot, Pets at Home)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0
Wey Retail Park, Royston Road, Byfleet, West Byfleet, Surrey (includes Halfords, Carpet Right/Paul Simon, (previously MFI))	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woodbridge Road, Guildford (includes PC World,	0.3%	3	0.0%	0	0.0%	0	0.8%	0	1.7%	1	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Currys)																						
Addlestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Aldershot	2.2%	22	1.9%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.8%	20	0.0%	0
Ash	1.6%	16	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.7%	1	0.0%	0	6.1%	11	0.0%	0
Brighton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Camberley	0.3%	3	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.6%	1	0.7%	0
Chertsy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cobham	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cranleigh	0.9%	9	0.0%	0	0.0%	0	5.8%	2	9.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	2.1%	1	0.0%	0	0.0%	0
Croydon	0.9%	9	1.1%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	5	2.7%	2	0.0%	0	0.0%	0
Dorking	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	5	0.0%	0	0.0%	0	0.0%	0
Farnborough	2.2%	22	0.0%	0	0.7%	1	0.0%	0	0.0%	0	6.3%	11	2.9%	5	0.0%	0	0.0%	0	3.0%	5	0.8%	0
Farnham	0.9%	9	0.8%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	7	2.6%	1
Godalming	0.6%	6	0.9%	0	0.7%	1	4.4%	1	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	2
Guildford	11.3%	113	32.9%	12	30.0%	33	22.7%	7	16.4%	13	8.1%	14	4.4%	8	8.8%	10	3.7%	3	3.8%	7	18.3%	7
Haslemere	0.9%	9	0.0%	0	0.0%	0	1.2%	0	10.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Horsham	2.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	32.7%	23	0.0%	0	0.0%	0
Kingston	3.8%	38	1.9%	1	3.4%	4	6.0%	2	0.0%	0	4.0%	7	2.4%	4	17.6%	19	0.6%	0	0.0%	0	3.3%	1
Leatherhead	0.8%	8	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	7	0.0%	0	0.0%	0	0.0%	0
Lightwater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London	0.7%	7	1.1%	0	0.0%	0	4.1%	1	0.7%	1	0.0%	0	0.5%	1	0.0%	0	0.8%	1	1.5%	3	1.6%	1
Reading	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Southampton	0.4%	4	0.0%	0	1.0%	1	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.7%	0
Staines	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking	2.1%	21	0.0%	0	1.0%	1	0.0%	0	0.7%	1	8.0%	14	2.8%	5	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Internet / Catalogue	5.8%	58	5.1%	2	4.0%	4	3.9%	1	6.5%	5	4.3%	7	2.1%	4	6.5%	7	6.5%	5	11.7%	20	4.9%	2
Abroad	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ash Vale	0.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Ashtead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Bagshot	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Byfleet	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester	0.8%	8	0.0%	0	0.0%	0	0.0%	0	9.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Farncombe	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Forbury Retail Park, Forbury Road, Reading	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Bookham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.7%	0
High Wycombe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Croydon Valley Park, Purley Way, Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
IKEA, West Quay Road, Southampton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Kingston-upon-Thames	0.1%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Knaphill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manchester	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New Malden	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	7.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vale Furnishers, Wharf Road, Ash Vale	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vincent Flooring, Hersham Road, Walton-on-Thames	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Byfleet	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	15.8%	159	7.6%	3	4.6%	5	15.4%	5	9.7%	8	25.7%	43	16.1%	30	15.4%	17	9.3%	7	21.9%	38	10.3%	4
(Don't do this type of shopping)	23.9%	240	37.3%	14	28.7%	32	15.4%	5	19.2%	15	26.9%	46	24.3%	45	16.9%	18	15.8%	11	22.2%	38	41.0%	15
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q17 Where do you normally do most of your household's shopping for DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc)?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Tesco Extra, Horsham EXTRA, Wickhurst Lane, Horsham	0.3%	3	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Wickes, 102 Inkerman Rd, Knaphill, Woking, Surrey	2.4%	24	0.9%	0	0.7%	1	1.2%	0	0.0%	0	11.2%	19	1.4%	3	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Broadbridge Heath Retail Park, Horsham (includes Halfords, Homebase, Carpetright)	3.9%	39	0.0%	0	1.0%	1	0.8%	0	1.8%	1	0.0%	0	0.0%	0	2.0%	2	47.1%	33	0.0%	0	2.5%	1
County Oak Retail Park, Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Farnborough Gate Retail Park, Farnborough	4.1%	41	0.8%	0	0.8%	1	0.0%	0	0.0%	0	5.7%	10	1.4%	3	0.0%	0	0.0%	0	16.0%	27	0.0%	0
Godalming Retail Park, Godalming	1.2%	12	1.1%	0	0.0%	0	5.8%	2	9.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	2
Ladymead Retail Park, Europa Park Rd, Guildford, Surrey (includes Sports World, Comet, B&Q, Homebase, Halfords)	12.0%	120	45.9%	17	34.9%	39	35.6%	11	17.5%	14	10.8%	18	3.2%	6	4.4%	5	0.7%	0	4.2%	7	6.8%	2
Lion Retail Park, 151, Oriental Rd, Woking, Surrey (includes Halfords, Currys, Focus DIY)	1.9%	19	0.0%	0	0.8%	1	0.0%	0	0.0%	0	6.8%	12	3.0%	6	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Paddock Retail Park, Sopwith Way, Brooklands, Weybridge (includes Argos, Currys, M&S, Tesco Extra, Mothercare)	0.2%	2	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redding Way, Knaphill, Woking, Surrey (includes Sainsbury's/Homebase)	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.8%	6	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0
Solartron Retail Estate, Farnborough (includes B&Q, DFS, Paul Simon, Carpetright, Allied Carpets, Maplin, The sleep Depot, Pets at Home)	3.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.8%	1	18.2%	31	0.0%	0
Woodbridge Road, Guildford (includes PC World, Currys)	0.2%	2	1.1%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Addlestone	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldershot	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.7%	0
Bracknell	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camberley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chobham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Cobham	0.4%	4	0.0%	0	2.1%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cranleigh	0.6%	6	0.0%	0	0.0%	0	5.1%	2	5.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.2%	2	0.0%	0	0.0%	0
Croydon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Dorking	1.3%	13	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	11.5%	12	0.0%	0	0.0%	0	0.0%	0
Farnborough	5.1%	51	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	6.6%	12	0.0%	0	0.0%	0	22.4%	39	0.7%	0
Farnham	3.0%	31	0.0%	0	0.7%	1	0.8%	0	0.7%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	16.4%	28	0.0%	0
Godalming	3.1%	31	1.1%	0	0.0%	0	15.3%	5	11.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.2%	17
Guildford	8.0%	80	23.8%	9	29.9%	33	10.1%	3	17.0%	14	3.8%	6	3.8%	7	3.9%	4	0.7%	0	0.0%	0	7.9%	3
Haslemere	0.5%	5	0.0%	0	0.0%	0	0.0%	0	6.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham	3.1%	32	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	8.1%	9	31.5%	22	0.0%	0	0.0%	0
Kingston	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Leatherhead	4.8%	48	0.0%	0	3.2%	4	0.0%	0	0.0%	0	2.6%	4	0.5%	1	36.4%	39	0.0%	0	0.0%	0	0.0%	0
London	0.1%	1	0.0%	0	0.7%	1	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milford	0.2%	2	0.8%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Staines	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sutton	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	6.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weybridge	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Windlesham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Windsor	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking	4.2%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	31	5.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / Catalogue	0.8%	8	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	3.0%	3	1.5%	1	1.1%	2	0.0%	0
B&Q, Invincible Road, Farnborough	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
B&Q, Kingston Road, Leatherhead	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	4.9%	5	0.0%	0	0.0%	0	0.0%	0
B&Q, Purbrook Way, Havant	0.7%	7	0.0%	0	0.0%	0	0.0%	0	9.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bourne Valley Garden Centre, Woodham Park Road, Addlestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brook	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brookwood	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Byfleet	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clandon Park, West Clandon	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Ewell	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Farnham Retail Park, Guildford Road, Farnham	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	6	0.0%	0
Frensham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Hanworth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Farnham Retail	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Park, Guildford Road, Farnham																						
Homebase, Redding Way, Knaphill, Woking	0.2%	2	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Reigate Road, Ewell, Epsom	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Homebase, Woolsack Way, Godalming	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knaphill	0.5%	5	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leeds	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longacres Garden Centre, London Road, Bagshot	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
New Haw	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New Malden	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Squire's Garden Centre, Badshot Lea Road, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Squire's Garden Centre, Epsom Road, West Horsley, Leatherhead	0.1%	1	0.8%	0	0.0%	0	0.8%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Squire's Garden Centre, Stoke Road, Stoke D'Abernon, Cobham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Waterlooville	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waverley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
West Clandon	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
World Of Water, Haslemere Road, Brook, Godalming	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wyevale Garden Centres, New Haw Road, Addlestone	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	4.5%	45	1.8%	1	1.8%	2	9.2%	3	2.5%	2	11.0%	19	2.6%	5	5.1%	6	4.1%	3	2.6%	5	3.9%	1
(Don't do this type of shopping)	14.0%	140	18.4%	7	19.4%	22	10.6%	3	5.8%	5	17.2%	29	21.7%	40	7.0%	8	8.2%	6	7.2%	12	22.4%	8
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q18 How often do you or your household visit Guildford Town Centre for shopping?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	0.4%	4	10.2%	4	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Twice a week or more	3.7%	37	32.0%	12	5.4%	6	7.4%	2	1.6%	1	0.5%	1	0.0%	0	0.0%	0	0.7%	0	7.5%	13	4.4%	2
Once a week	9.5%	96	27.9%	10	30.6%	34	19.7%	6	7.8%	6	15.2%	26	0.6%	1	3.5%	4	1.9%	1	1.4%	2	12.3%	5
Every two weeks	14.3%	144	12.1%	5	25.8%	29	21.9%	7	17.3%	14	13.8%	23	2.7%	5	15.2%	16	1.3%	1	18.5%	32	33.3%	12
Monthly	15.6%	156	6.3%	2	14.7%	16	20.2%	6	27.0%	22	17.7%	30	12.2%	23	19.0%	21	8.4%	6	12.8%	22	22.8%	8
Once every 2 months	7.1%	71	2.7%	1	5.2%	6	2.8%	1	21.2%	17	5.8%	10	4.8%	9	9.9%	11	4.9%	3	6.5%	11	6.7%	2
About once every 3-4 months	10.0%	101	1.9%	1	6.7%	7	7.3%	2	6.2%	5	15.7%	27	8.3%	15	15.8%	17	14.1%	10	8.0%	14	7.2%	3
About once every 6 months	9.8%	98	0.0%	0	2.6%	3	1.8%	1	10.6%	8	10.1%	17	8.0%	15	8.3%	9	13.1%	9	19.5%	34	6.4%	2
Once a year or less	10.3%	104	4.6%	2	4.4%	5	6.3%	2	3.5%	3	7.9%	13	9.6%	18	19.3%	21	19.0%	13	15.3%	26	1.5%	1
Never	19.1%	192	2.2%	1	4.8%	5	11.8%	4	4.8%	4	13.3%	23	53.9%	100	8.9%	10	36.6%	26	10.6%	18	4.6%	2
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q19 What, if anything, would make you visit Guildford to shop more often? [MR]

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Better and / or free car parking	22.8%	228	10.6%	4	14.9%	17	33.1%	10	25.6%	21	25.3%	43	27.4%	51	19.7%	21	32.0%	23	19.8%	34	13.9%	5
Better bus service / accessible public transport	1.5%	15	1.6%	1	0.0%	0	3.6%	1	0.0%	0	0.6%	1	0.0%	0	4.7%	5	4.7%	3	2.2%	4	0.0%	0
Better disabled access	0.5%	5	1.7%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.6%	1	1.5%	1	0.8%	1	0.0%	0
Better prices	2.1%	21	0.8%	0	1.9%	2	1.8%	1	1.4%	1	0.5%	1	0.0%	0	0.7%	1	2.4%	2	7.5%	13	2.1%	1
Better range of chain / well known stores	1.9%	19	4.6%	2	2.9%	3	2.2%	1	5.2%	4	0.0%	0	1.4%	3	1.7%	2	1.5%	1	1.8%	3	0.7%	0
Better range of independent stores	3.1%	31	6.7%	3	4.3%	5	7.6%	2	12.5%	10	1.1%	2	1.4%	3	0.0%	0	1.5%	1	1.9%	3	6.5%	2
Better/ more restaurant / cafes	1.6%	16	0.0%	0	2.2%	2	1.9%	1	9.0%	7	1.1%	2	1.7%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Better/ new cinema	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better/ new market	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Friendlier atmosphere	0.1%	1	0.0%	0	0.0%	0	0.9%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
If it was close to friends/ family	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
If it was close to home	2.7%	27	0.0%	0	0.0%	0	0.9%	0	0.0%	0	5.7%	10	2.6%	5	3.6%	4	10.5%	7	0.0%	0	3.0%	1
If it was close to work / en route to work	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
If it was pedestrianised	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Larger shopping area	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Less overcrowded / less busy	1.3%	14	0.8%	0	2.2%	2	2.2%	1	0.8%	1	2.8%	5	0.0%	0	0.6%	1	2.3%	2	0.8%	1	2.8%	1
Longer opening hours	0.3%	3	1.1%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
More attractive environment	0.9%	9	0.0%	0	5.0%	6	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.6%	1	2.8%	1
More compact	1.2%	12	0.0%	0	3.7%	4	0.0%	0	0.0%	0	1.7%	3	0.6%	1	0.0%	0	2.4%	2	1.5%	3	0.0%	0
More easily accessible by foot/ cycle	0.6%	6	1.6%	1	3.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.8%	0
More/ better indoor shopping malls/ arcades	0.3%	3	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safer shopping environment	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Wider range of goods available	1.8%	18	1.1%	0	3.6%	4	0.9%	0	0.0%	0	7.1%	12	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
A particular store being there (Write in name of retailer)	1.2%	12	10.4%	4	1.8%	2	0.8%	0	1.5%	1	0.0%	0	0.0%	0	2.8%	3	0.7%	0	0.0%	0	2.6%	1
Other	3.2%	32	9.1%	3	1.8%	2	1.6%	0	6.1%	5	0.0%	0	7.1%	13	2.0%	2	0.8%	1	2.9%	5	1.5%	1
Cheaper parking	0.8%	8	1.1%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	1.5%	3	1.1%	0
Cheaper shops	1.5%	15	1.1%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	13	0.8%	0
Clothes shops	0.5%	5	2.9%	1	0.0%	0	0.0%	0	1.8%	1	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Easier access by car	0.7%	7	0.0%	0	0.7%	1	1.2%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0	3.7%	3	0.8%	1	0.0%	0
Flatter ground	2.6%	26	1.1%	0	1.4%	2	0.8%	0	2.4%	2	0.6%	1	0.8%	1	1.8%	2	2.9%	2	8.8%	15	2.2%	1
Improved infrastructure	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
John Lewis	2.4%	24	1.7%	1	3.1%	3	2.8%	1	3.2%	3	1.1%	2	2.2%	4	4.4%	5	0.0%	0	2.0%	3	5.9%	2
Less traffic	1.2%	12	3.8%	1	0.7%	1	0.0%	0	4.0%	3	0.6%	1	0.5%	1	0.0%	0	1.5%	1	1.3%	2	2.8%	1

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Lidl	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.1%	0
Waitrose	0.6%	6	0.9%	0	3.1%	3	0.8%	0	0.7%	1	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	4.1%	42	0.0%	0	3.1%	3	3.6%	1	2.3%	2	2.9%	5	8.3%	15	3.2%	3	0.6%	0	3.5%	6	13.0%	5
Nothing / very little	49.4%	496	51.5%	19	50.7%	57	45.1%	14	38.1%	31	50.0%	85	54.0%	100	55.8%	60	42.4%	30	47.8%	82	48.7%	18
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q20 How often do you or your household visit the following leisure attractions? [MR/PR]

Bingo / Casino/ Bookmaker

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Once a week	1.3%	13	2.4%	1	2.2%	2	0.9%	0	0.7%	1	0.5%	1	0.6%	1	3.3%	4	2.2%	2	0.8%	1	1.8%	1
Once a fortnight	0.2%	2	0.8%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	1	0.0%	0
Once every 2 months	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Once every 3 months	0.1%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a year	2.3%	23	0.0%	0	0.0%	0	1.2%	0	12.6%	10	1.1%	2	2.7%	5	2.2%	2	1.5%	1	1.1%	2	1.1%	0
(Don't know / varies)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Don’t do this activity	95.3%	955	96.8%	36	97.8%	109	95.1%	29	86.8%	69	98.4%	167	92.9%	173	94.5%	102	93.7%	66	97.4%	168	97.2%	36
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Cinema

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Once a week	0.9%	9	0.8%	0	1.8%	2	0.9%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.7%	2	1.4%	2	3.2%	1
Once a fortnight	4.9%	50	4.3%	2	0.7%	1	3.2%	1	1.3%	1	6.2%	10	3.2%	6	4.3%	5	8.8%	6	9.6%	17	3.5%	1
Once a month	14.6%	146	14.8%	6	18.4%	20	16.6%	5	17.0%	14	20.1%	34	8.0%	15	11.8%	13	19.7%	14	12.5%	21	12.3%	5
Once every 2 months	13.8%	139	9.4%	4	12.1%	13	5.4%	2	14.7%	12	11.5%	19	18.3%	34	15.9%	17	9.8%	7	16.4%	28	6.5%	2
Once every 3 months	20.8%	208	16.6%	6	12.3%	14	17.5%	5	25.7%	21	13.5%	23	30.0%	56	21.6%	23	16.7%	12	23.9%	41	20.7%	8
Once a year	11.4%	114	7.4%	3	18.2%	20	10.9%	3	12.9%	10	12.1%	20	6.2%	12	10.8%	12	11.4%	8	12.9%	22	8.1%	3
(Don't know / varies)	3.6%	36	2.5%	1	2.7%	3	1.3%	0	1.8%	1	2.6%	4	8.0%	15	1.8%	2	3.0%	2	3.1%	5	3.3%	1
Don’t do this activity	30.1%	301	44.2%	17	33.9%	38	44.1%	13	26.6%	21	34.1%	58	25.7%	48	33.8%	36	27.9%	20	20.2%	35	42.5%	16
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gym / Healthclub / Sports Facility																						
Once a week	27.8%	279	23.7%	9	21.1%	24	17.1%	5	33.7%	27	32.1%	54	33.8%	63	26.0%	28	27.9%	20	23.9%	41	21.2%	8
Once a fortnight	2.4%	24	3.3%	1	0.7%	1	0.8%	0	4.8%	4	2.3%	4	1.4%	3	3.2%	3	2.2%	2	2.9%	5	2.5%	1
Once a month	0.8%	8	0.0%	0	1.8%	2	3.4%	1	0.0%	0	0.5%	1	0.0%	0	0.9%	1	0.0%	0	1.5%	3	2.6%	1
Once every 2 months	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.9%	1
Once every 3 months	1.8%	18	0.0%	0	0.7%	1	0.0%	0	12.6%	10	0.0%	0	0.6%	1	2.8%	3	0.7%	0	1.5%	3	0.8%	0
Once a year	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	1.4%	3	1.0%	1	1.8%	1	0.0%	0	0.0%	0
(Don't know / varies)	0.3%	3	0.8%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.8%	1	0.0%	0	1.1%	0
Don’t do this activity	66.1%	662	72.2%	27	75.7%	84	76.9%	23	48.1%	39	64.6%	109	62.1%	115	65.1%	70	66.6%	47	70.3%	121	69.8%	26
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100
Theatre/ Concert/ Music venue																						
Once a week	0.8%	8	0.8%	0	2.2%	2	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.1%	1	0.6%	1	1.6%	1
Once a fortnight	2.3%	23	0.9%	0	1.0%	1	1.6%	0	2.1%	2	2.1%	4	7.7%	14	0.6%	1	0.0%	0	0.0%	0	1.5%	1
Once a month	8.7%	88	8.9%	3	8.0%	9	12.7%	4	10.1%	8	5.3%	9	9.0%	17	17.2%	19	16.8%	12	2.2%	4	9.6%	4
Once every 2 months	9.4%	94	8.5%	3	7.7%	9	4.7%	1	14.3%	11	8.3%	14	13.3%	25	13.6%	15	9.3%	7	4.4%	8	4.9%	2
Once every 3 months	21.2%	213	21.5%	8	20.7%	23	15.0%	5	25.0%	20	12.3%	21	28.4%	53	16.6%	18	20.4%	14	26.0%	45	16.5%	6
Once a year	12.8%	129	14.3%	5	12.7%	14	11.0%	3	16.2%	13	14.6%	25	12.2%	23	11.1%	12	11.5%	8	11.7%	20	13.9%	5
(Don't know / varies)	6.9%	69	2.4%	1	2.7%	3	1.2%	0	3.5%	3	17.2%	29	2.0%	4	5.8%	6	13.7%	10	7.3%	12	2.2%	1
Don’t do this activity	37.9%	380	42.6%	16	45.0%	50	50.8%	15	28.7%	23	40.2%	68	27.5%	51	34.2%	37	26.3%	19	47.9%	82	49.9%	18
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100
Museum / gallery or place of historical / cultural interest																						
Once a week	0.4%	4	0.0%	0	0.7%	1	0.9%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.7%	0
Once a fortnight	1.7%	17	2.1%	1	2.2%	2	2.8%	1	4.2%	3	1.1%	2	0.0%	0	4.9%	5	0.7%	0	0.8%	1	1.8%	1
Once a month	7.4%	74	5.6%	2	8.4%	9	3.3%	1	6.4%	5	4.3%	7	11.7%	22	8.3%	9	14.9%	11	3.4%	6	6.6%	2
Once every 2 months	5.1%	51	8.5%	3	6.8%	8	4.7%	1	5.5%	4	4.6%	8	6.0%	11	7.1%	8	6.3%	4	0.6%	1	7.9%	3
Once every 3 months	13.7%	137	15.4%	6	18.2%	20	13.7%	4	21.2%	17	10.2%	17	9.6%	18	12.8%	14	19.7%	14	12.0%	21	16.7%	6
Once a year	15.3%	153	10.7%	4	13.3%	15	13.2%	4	23.3%	19	17.3%	29	15.5%	29	9.1%	10	12.7%	9	17.4%	30	12.8%	5
(Don't know / varies)	5.4%	54	4.5%	2	2.7%	3	0.0%	0	2.4%	2	9.2%	16	7.7%	14	5.9%	6	7.1%	5	2.8%	5	2.2%	1
Don’t do this activity	51.0%	512	53.2%	20	47.7%	53	61.4%	19	36.3%	29	53.5%	91	49.5%	92	51.9%	56	38.7%	27	61.5%	106	51.2%	19
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Pub / Bar / nightclub																						
Once a week	12.0%	120	13.8%	5	15.0%	17	9.9%	3	18.8%	15	11.2%	19	8.9%	16	11.2%	12	14.6%	10	9.7%	17	15.9%	6
Once a fortnight	18.5%	185	4.6%	2	9.1%	10	7.3%	2	22.1%	18	26.3%	45	28.3%	53	8.6%	9	25.2%	18	14.1%	24	13.5%	5
Once a month	18.4%	184	17.1%	6	9.6%	11	17.4%	5	13.5%	11	14.3%	24	27.7%	51	23.1%	25	19.5%	14	16.7%	29	21.6%	8
Once every 2 months	3.8%	38	2.7%	1	4.2%	5	6.3%	2	6.6%	5	2.2%	4	2.6%	5	7.8%	8	4.1%	3	2.1%	4	4.4%	2
Once every 3 months	2.6%	26	1.1%	0	3.0%	3	0.0%	0	5.5%	4	2.0%	3	1.9%	4	2.4%	3	2.2%	2	3.6%	6	1.9%	1
Once a year	1.2%	12	3.2%	1	1.8%	2	0.0%	0	1.7%	1	0.0%	0	1.4%	3	1.5%	2	3.6%	3	0.0%	0	2.4%	1
(Don't know / varies)	1.7%	17	0.0%	0	0.7%	1	2.0%	1	2.4%	2	2.1%	4	2.5%	5	2.5%	3	2.8%	2	0.0%	0	1.2%	0
Don’t do this activity	41.9%	420	57.4%	22	56.6%	63	57.2%	17	29.3%	23	41.8%	71	26.8%	50	42.9%	46	28.1%	20	54.0%	93	39.2%	14
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100
Restaurant / Café																						
Once a week	20.8%	208	21.2%	8	15.6%	17	15.4%	5	15.7%	13	22.2%	38	15.2%	28	24.3%	26	27.8%	20	26.8%	46	21.4%	8
Once a fortnight	26.7%	267	15.3%	6	21.2%	24	18.2%	6	26.1%	21	34.6%	59	33.0%	61	11.6%	13	29.6%	21	30.2%	52	16.6%	6
Once a month	22.4%	225	27.2%	10	26.9%	30	23.2%	7	27.3%	22	15.3%	26	19.7%	37	34.5%	37	22.5%	16	19.2%	33	18.2%	7
Once every 2 months	6.2%	63	4.3%	2	10.7%	12	7.5%	2	2.3%	2	6.6%	11	5.8%	11	6.3%	7	7.4%	5	5.6%	10	3.6%	1
Once every 3 months	3.6%	36	8.8%	3	5.4%	6	1.8%	1	5.4%	4	2.2%	4	3.8%	7	3.0%	3	1.5%	1	2.8%	5	5.3%	2
Once a year	1.5%	15	3.7%	1	0.7%	1	0.9%	0	3.2%	3	0.0%	0	0.0%	0	1.4%	1	1.5%	1	3.6%	6	4.3%	2
(Don't know / varies)	2.1%	21	1.1%	0	1.4%	2	4.8%	1	3.1%	2	2.5%	4	1.4%	3	2.5%	3	0.7%	0	2.6%	4	1.9%	1
Don’t do this activity	16.7%	167	18.3%	7	18.1%	20	28.3%	9	16.9%	14	16.6%	28	21.2%	39	16.4%	18	9.2%	6	9.2%	16	28.8%	11
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100
Family Entertainment (e.g. Tenpin bowling, Skating Rink)																						
Once a week	1.3%	13	0.9%	0	3.6%	4	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	3.0%	2	2.3%	4	0.8%	0
Once a fortnight	3.0%	30	0.0%	0	0.0%	0	0.0%	0	2.9%	2	2.2%	4	9.1%	17	1.8%	2	1.5%	1	2.3%	4	0.0%	0
Once a month	4.5%	45	5.0%	2	4.8%	5	0.0%	0	3.3%	3	4.5%	8	2.0%	4	4.1%	4	4.0%	3	9.2%	16	0.7%	0
Once every 2 months	6.0%	60	2.1%	1	0.0%	0	0.0%	0	4.3%	3	9.4%	16	5.0%	9	12.5%	13	3.3%	2	8.1%	14	2.7%	1
Once every 3 months	5.5%	55	2.1%	1	1.7%	2	0.9%	0	12.7%	10	3.2%	6	7.8%	15	10.0%	11	3.6%	3	3.1%	5	7.9%	3
Once a year	5.4%	54	2.8%	1	3.9%	4	4.4%	1	6.1%	5	3.0%	5	6.1%	11	2.2%	2	9.7%	7	8.8%	15	4.9%	2
(Don't know / varies)	0.7%	7	2.6%	1	0.0%	0	1.2%	0	0.0%	0	1.5%	3	0.6%	1	0.7%	1	0.0%	0	0.0%	0	2.7%	1
Don’t do this activity	73.7%	739	84.6%	32	86.1%	96	93.5%	28	68.3%	55	76.1%	129	69.3%	129	68.6%	74	74.9%	53	66.2%	114	80.2%	30
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q21 Where do you or members of your household normally go to play bingo or visit casinos or bookmakers?
Those who play bingo or visit casinos or bookmakers at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gala Bingo, High Street, Town Centre, Aldershot	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.3%	1	0.0%	0
Aldershot town centre	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.8%	1	0.0%	0
Crawley town centre	3.5%	2	0.0%	0	0.0%	0	23.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.2%	1	0.0%	0	0.0%	0
Dorking town centre	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.5%	1	0.0%	0	0.0%	0	0.0%	0
Godalming town centre	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1
Guildford town centre	8.8%	4	75.0%	1	100.0%	2	0.0%	0	0.0%	0	30.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsham town centre	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.4%	1	0.0%	0	0.0%	0
Leatherhead town centre	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.3%	1	0.0%	0	0.0%	0	0.0%	0
London West End	10.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	69.6%	2	0.0%	0	30.4%	2	0.0%	0	25.1%	1	0.0%	0
Weybridge town centre	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	8.8%	4	25.0%	0	0.0%	0	19.1%	0	0.0%	0	0.0%	0	27.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bournemouth Town Centre	6.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chertsey Town Centre	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chilworth Village Centre	0.5%	0	0.0%	0	0.0%	0	16.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh	4.1%	2	0.0%	0	0.0%	0	0.0%	0	18.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gala Bingo, Queensway, Kingsgate, Crawley	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	1	0.0%	0	0.0%	0
Great Bookham Village Centre	5.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.8%	2	0.0%	0	0.0%	0	0.0%	0
Gunwharf Quays, Portsmouth	15.2%	7	0.0%	0	0.0%	0	0.0%	0	68.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.9%	1	0.0%	0	0.0%	0
Knaphill Village Centre	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reading Town Centre	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.8%	1	0.0%	0
Whiteley Village Centre	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	8.2%	4	0.0%	0	0.0%	0	40.4%	1	13.4%	1	0.0%	0	10.8%	1	0.0%	0	10.4%	0	0.0%	0	0.0%	0
Weighted base:		47		1		2		1		11		3		13		6		4		4		1
Sample:		43		4		1		5		4		2		8		6		6		4		3

Q22 Where do you or members of your household normally go to the cinema?
Those who go to the cinema at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Ambassadors, The Peacocks Centre, Woking	14.4%	101	3.8%	1	1.2%	1	0.0%	0	0.0%	0	44.9%	50	35.4%	49	0.0%	0	0.0%	0	0.0%	0	1.3%	0
Borough Hall Cinema, Bridge St, Godalming	0.6%	4	0.0%	0	0.0%	0	1.5%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	2
Cineworld, Westgate, Aldershot	12.9%	90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	65.4%	90	1.5%	0
Cranleigh Arts Centre Cinema, High Street, Cranleigh	0.2%	1	0.0%	0	1.2%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Halls, Reigate Road, Dorking	1.6%	11	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	15.3%	11	0.0%	0	0.0%	0	0.0%	0
Haslemere Hall, Bridge Road, Haslemere	0.9%	6	0.0%	0	0.0%	0	1.7%	0	9.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leatherhead Theatre and Cinema, 7 Church Street, Leatherhead	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4	0.0%	0	0.0%	0	0.0%	0
Odeon, Bedford Rd, Guildford	34.2%	240	91.3%	19	86.7%	64	91.8%	16	78.7%	46	25.0%	28	1.5%	2	20.4%	15	2.9%	1	25.4%	35	66.2%	14
Shere Village Cinema, not-for-profit cinema, Surrey	0.4%	3	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
The Capitol Theatre and Cinema, North St, Horsham	3.1%	22	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	2.5%	2	38.5%	20	0.0%	0	0.0%	0
The Maltings Cinema, Bridge Square, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
The New Victoria / Rhoda Mcgraw Theatre, Woking	2.5%	17	0.0%	0	1.5%	1	0.0%	0	0.0%	0	6.5%	7	6.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldershot town centre	0.7%	5	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Crawley town centre	3.6%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4	42.2%	22	0.0%	0	0.0%	0
Dorking town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Farnham town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Godalming town centre	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Guildford town centre	1.6%	12	2.9%	1	3.1%	2	2.1%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	4	0.0%	0	0.8%	1	16.2%	3
Horsham town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Leatherhead town centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London West End	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	4.4%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	8	16.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camberley Town Centre	2.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	10	3.7%	5	0.0%	0	0.0%	0	2.6%	4	0.0%	0
Cineworld, Crawley Leisure Park, London Road, Crawley	1.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	16.4%	8	0.0%	0	0.0%	0
Cineworld, Leisure West, Air Park Way, Feltham	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Elstead Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	1.9%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	14	0.0%	0	0.0%	0	0.0%	0
Esher Town Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	5.5%	4	0.0%	0	0.0%	0	0.0%	0
Everyman Cinema, High Street, Walton-on-Thames	0.5%	4	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.8%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	0
Gunwharf Quays, Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hexham Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Odeon IMAX, The Rotunda, Clarence Street, Kingston-upon-Thames	1.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, High Street, Esher	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Port Way, Port Solent	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Upper High Street, Epsom	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.0%	0
Staines-upon-Thames Town Centre	1.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	5.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sutton Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Vue, Festival Place Shopping Centre, Lesser Market, Basingstoke	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Vue, The Atrium, Park Street, Camberley	1.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	6	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Vue, Two Rivers Retail Park, Mustard Mill Road, Staines-upon-Thames	1.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wimbledon Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.2%	9	2.1%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	3.0%	4	5.0%	4	0.0%	0	0.0%	0	0.0%	0
Weighted base:		701		21		74		17		59		112		138		71		51		137		21
Sample:		617		53		59		52		68		65		59		61		72		69		59

Q23 Where do you or members of your household normally go to use a gym / healthclub / sports facility?

Those who use a gym / healthclub / sports facility at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
ActivZone Gym - within Guildford College of Furth, Stoke Park, Guildford	0.5%	2	12.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	0
Addlestone Leisure Centre, School Lane, Addlestone, Surrey	0.4%	1	0.0%	0	0.0%	0	4.1%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldershot Garrison sports centre, Rawlinson Rd, Aldershot	0.9%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0
Aqua Roma Leisure Newlands Corner, Guildford	0.4%	2	0.0%	0	0.0%	0	7.1%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ash Manor Sports Club, Manor Rd, Ash, Aldershot	1.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	5	0.0%	0
Body Zone Active Fitness, Old Mill House, High Street, Cranleigh	0.8%	3	0.0%	0	0.0%	0	12.2%	1	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Curves – Owen House, Heathside Road, Woking	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Curves, 70 Kingston Rd, Leatherhead	0.5%	2	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Curves, Gladstone Rd, Horsham	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	3	0.0%	0	0.0%	0
Curves, Hippodrome House, Birchett Rd, Aldershot	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
David Lloyd – Westfield Avenue, Old Woking	0.8%	3	0.0%	0	2.8%	1	0.0%	0	0.0%	0	1.4%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
David Lloyd Farnham, Monkton Ln, Farnham, Surrey	1.3%	5	0.0%	0	0.0%	0	9.3%	1	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	4.0%	2	0.0%	0
David Lloyd, Brooklands Rd, Surrey	1.2%	4	0.0%	0	0.0%	0	4.1%	0	0.0%	0	6.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking Sports Cente, Reigate Road, Dorking	1.6%	5	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.7%	5	0.0%	0	0.0%	0	0.0%	0
Elegance Ladies Only Health Club, 67 Wey Hill, Haslemere	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farnham Sports Center Dogflud Way, Farnham	2.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	9	0.0%	0
Fitness First Godalming - 1st Floor, 48-56 High Street, Godalming	0.5%	2	0.0%	0	0.0%	0	7.1%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	1
Godalming Leisure Centre -	2.7%	9	7.5%	1	0.0%	0	5.1%	0	8.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.7%	5

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broadwater Park, Summers Road, Godalming																						
Guildford Spectrum, Parkway, Guildford	4.5%	15	3.3%	0	34.9%	9	0.0%	0	5.3%	2	1.7%	1	1.6%	1	2.6%	1	0.0%	0	0.0%	0	2.8%	0
Herons Leisure Centre, Kings Road, Haslemere	3.8%	13	0.0%	0	0.0%	0	0.0%	0	31.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holbrook Club, N Heath Ln, Horsham	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	2	2.7%	1	0.0%	0
HoneFitness, Oak Park Golf Club, Heath Lane, Crondall, Farnham	0.5%	2	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
LA Fitness - Arthurs Bridge Wharf, Horsell Moor, Woking	3.6%	12	7.6%	1	0.0%	0	0.0%	0	0.0%	0	18.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LA Fitness Epsom Road, Guildford	0.3%	1	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nuffield Health & Fitness, The Crescent, Leatherhead	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	3	0.0%	0	0.0%	0	0.0%	0
Nuffield Health & Fitness, Weybourne Rd, Farnham	1.6%	6	7.6%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	3.7%	3	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Nuffield Health & Wellbeing (formerly Cannons) – Pyrford Road, West Byfleet (may also call it Pyrford)	5.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	22.4%	16	0.0%	0	0.0%	0	4.9%	3	0.0%	0
Quantum Health & Fitness – University of Surrey, Guildford	0.4%	1	4.1%	0	0.0%	0	3.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	1
Quantum Puruits – Beech Hill, Brook, Godalming	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	0
Spirit Health and Fitness – Post House Hotel, Egerton Road, Guildford	0.4%	1	12.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Johns Fitness Centre (previously Fils) - 5-7, St. Johns Rd, St Johns, Woking	0.5%	2	0.0%	0	0.0%	0	3.5%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Surrey University Sports Park	1.5%	5	11.7%	1	0.0%	0	4.1%	0	1.5%	1	3.2%	2	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
The Pavilion Health & Fitness club, 1 Fleet Rd, Aldershot	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	3	0.0%	0	0.0%	0
Virgin active, Queen Elizabeth Park, Railton Rd, Guildford	0.4%	1	9.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Winston Churchill School	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sports Centre – Hermitage Road, St Johns																						
Woking Leisure Centre/Pool in the Park - Woking	3.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldershot town centre	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crawley town centre	0.9%	3	0.0%	0	2.8%	1	4.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	2	0.0%	0	0.0%	0
Dorking town centre	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	3	0.0%	0	0.0%	0	0.0%	0
Farnborough town centre	1.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	4	0.0%	0
Farnham town centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0
Godalming town centre	1.3%	4	4.7%	0	0.0%	0	16.2%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	17.9%	2
Guildford town centre	7.6%	26	9.1%	1	18.4%	5	5.1%	0	1.5%	1	22.3%	13	0.0%	0	0.0%	0	0.0%	0	9.0%	5	8.4%	1
Horsham town centre	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.3%	3	0.0%	0	0.0%	0
Leatherhead town centre	2.9%	10	0.0%	0	7.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	8	0.0%	0	0.0%	0	0.0%	0
London West End	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	4.5%	1	0.0%	0	0.0%	0
Weybridge town centre	3.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	2.3%	8	0.0%	0	4.0%	1	0.0%	0	0.0%	0	8.7%	5	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abinger Hammer Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Aldershot Pools, Guildford Road, Aldershot	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Aqua Roma Leisure, High Street, Haslemere	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluecoat Sports Health & Fitness Club, Christs Hospital, Horsham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Bracknell Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brightwells Tennis Club, Farnham	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Broadbridge Heath Leisure Centre, Wickhurst Lane, Broadbridge Heath	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0	0.0%	0
Brooklands, Weybridge	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cannons Health Club, Leatherhead	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Charterhouse Club, Duke's Drive, Godalming	0.3%	1	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	1
Chertsey	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Golf & Country Club, Barhatch Lane, Cranleigh	0.9%	3	0.0%	0	0.0%	0	0.0%	0	7.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Leisure Centre, Village Way, Cranleigh	1.4%	5	0.0%	0	0.0%	0	0.0%	0	9.5%	4	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Cranleigh School, Horseshoe Lane, Cranleigh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Town Centre	0.3%	1	0.0%	0	0.0%	0	3.5%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Horsley Village Centre	0.5%	2	0.0%	0	6.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Egham Leisure Centre,	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Vicarage Road, Egham																						
Elmbridge Xcel Leisure Complex, Waterside Drive, Walton-on-Thames	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Esher	0.7%	2	0.0%	0	9.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fight Science, Queens Avenue, Aldershot	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0
Fitness First, Mitcham Road, Camberley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Functional Fitness, High Street, Cranleigh	0.1%	0	0.0%	0	0.0%	0	4.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodwood Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gordon's School, Bagshot Road, West End, Woking	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Haslemere Town Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hilton, Seven Hills Road South, Cobham	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0	0.0%	0
Horsham Golf & Fitness Club, Denne Park, Worthing Road, Horsham	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0	0.0%	0
Kinetika Gym, Farnham Leisure Centre, Dogflud Way, Farnham	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0
Leatherhead Leisure Centre, Guildford Road, Leatherhead	2.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.2%	8	0.0%	0	0.0%	0	0.0%	0
Lightwater Leisure Centre, The Avenue, Lightwater	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New Fitness Exchange, High Street, Godalming	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Old Thorns Manor Hotel Golf & Country Estate, Griggs Green, Liphook	0.4%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pavilions in the Park, Hurst Road, Horsham	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.8%	4	0.0%	0	0.0%	0
Prior's Field School, Priorsfield Road, Godalming	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	0
PureGym, Park Street, Camberley	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shere Village Centre	0.3%	1	0.0%	0	0.0%	0	3.5%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Slinfold Park Golf & Country Club, Stane Street, Slinfold	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	2	0.0%	0	0.0%	0
Slinfold Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Spelthorne Leisure Centre,	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Knowle Green, Staines-upon-Thames																						
Staines-upon-Thames town centre	3.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Surrey Sports Park, Richard Meyjes Road, Guildford	0.1%	0	4.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Cranleigh Golf & Country Club, Barhatch Lane, Cranleigh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Georgian House Hotel, High Street, Haslemere	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Weybridge Healthclub, Walton Lane, Weybridge	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wellington Health and Fitness Club, Crowthorne	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0
(Don’t know / varies)	2.7%	9	0.0%	0	4.0%	1	3.5%	0	6.8%	3	1.2%	1	3.6%	3	0.0%	0	2.0%	0	2.2%	1	2.8%	0
Weighted base:		340		10		27		7		42		60		70		38		24		51		11
Sample:		315		23		26		24		44		35		23		38		36		33		33

Q24 Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music?
Those who visit the theatre, watch concerts / live music at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dorking Halls, Reigate Road, Dorking	0.2%	1	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Haslemere Hall, Bridge Road, Haslemere	0.3%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leatherhead Theatre and Cinema, 7 Church Street, Leatherhead	0.4%	3	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0
The Capitol Theatre and Cinema, North St, Horsham	2.5%	16	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.5%	14	1.1%	1	0.0%	0
The New Victoria / Rhoda Mcgraw Theatre, Woking	13.4%	83	4.4%	1	16.1%	10	14.6%	2	4.5%	3	27.3%	28	19.4%	26	2.3%	2	0.0%	0	12.1%	11	6.7%	1
Aldershot town centre	1.1%	7	3.7%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	5	0.0%	0
Crawley town centre	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.3%	7	0.0%	0	0.0%	0
Dorking town centre	2.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.4%	14	0.0%	0	0.0%	0	0.0%	0
Farnborough town centre	0.2%	1	0.0%	0	0.0%	0	2.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Farnham town centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.5%	1	1.7%	0
Godalming town centre	0.9%	6	1.6%	0	0.0%	0	1.7%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	9.1%	2
Guildford town centre	11.8%	74	41.3%	9	19.8%	12	26.0%	4	21.0%	12	3.5%	3	3.3%	4	12.3%	9	1.7%	1	13.7%	12	37.9%	7
Horsham town centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	0.0%	0
Leatherhead town centre	0.4%	2	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
London West End	44.2%	275	27.7%	6	41.6%	26	36.7%	5	52.1%	30	45.2%	46	58.6%	79	42.7%	30	30.7%	16	36.2%	32	26.9%	5
Southampton town centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Woking town centre	6.0%	38	5.2%	1	9.4%	6	3.8%	1	1.1%	1	12.1%	12	6.1%	8	2.3%	2	4.5%	2	5.1%	5	2.9%	1
Bagshot Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basingstoke Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Birmingham City Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Bournemouth Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0
Brighton Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.7%	1	0.0%	0	0.0%	0
Camberley Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Chichester Festival Theatre, Oaklands Park, Chichester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester Town Centre	0.2%	1	0.0%	0	0.0%	0	1.7%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Epsom Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Ewhurst Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Liverpool City Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
O2 Arena, Peninsula Square, Greenwich, London	1.0%	6	0.0%	0	0.0%	0	1.9%	0	3.6%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	2.8%	3	0.0%	0
The Anvil, Churchill Way, Basingstoke	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Wokingham Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yvonne Arnaud Theatre, Millbrook, Guildford	0.3%	2	4.2%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	9.8%	61	10.5%	2	7.0%	4	8.0%	1	8.3%	5	8.6%	9	11.8%	16	10.3%	7	9.2%	5	9.7%	9	14.7%	3

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Weighted base:		622		22		61		15		57		101		135		71		52		90		18
Sample:		594		59		50		47		66		65		61		65		68		57		56

Q25 Where do you or members of your household normally go to a museum, gallery, or other place of historical / cultural interest?
Those who go to museums, galleries, or other places of historical / cultural interest at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dorking town centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0
Farnham town centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	1.7%	1	0.0%	0
Godalming town centre	0.4%	2	0.0%	0	0.0%	0	7.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1
Guildford town centre	2.8%	14	23.7%	4	5.8%	3	9.8%	1	4.3%	2	0.0%	0	0.0%	0	1.9%	1	0.9%	0	1.4%	1	3.0%	1
Horsham town centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	3	0.0%	0	0.0%	0
London West End	73.9%	363	57.2%	10	76.3%	44	55.3%	6	60.1%	31	82.6%	65	90.1%	84	79.3%	41	50.5%	22	74.2%	49	50.4%	9
Weybridge town centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Woking town centre	2.1%	10	1.7%	0	3.2%	2	2.4%	0	0.0%	0	5.5%	4	2.3%	2	0.0%	0	0.0%	0	1.4%	1	1.5%	0
Abroad	0.4%	2	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0
Brighton Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Chichester Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Haslemere Town Centre	1.2%	6	0.0%	0	0.0%	0	0.0%	0	11.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Portsmouth City Centre	0.1%	0	0.0%	0	0.0%	0	2.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shere Village Centre	0.1%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	16.8%	82	17.3%	3	14.8%	9	20.7%	2	19.9%	10	11.8%	9	3.8%	4	13.8%	7	38.8%	17	21.2%	14	39.0%	7
Weighted base:		491		18		58		12		51		79		94		52		43		66		18
Sample:		493		47		48		40		58		56		40		49		63		40		52

Q26 Where do you or members of your household normally go to a pub / bar / nightclub?
Those who go to pubs / bars / nightclubs at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldershot town centre	4.1%	24	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	28.8%	23	0.0%	0
Crawley town centre	0.2%	1	0.0%	0	1.8%	1	2.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorking town centre	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.7%	10	0.0%	0	0.0%	0	0.0%	0
Farnham town centre	3.6%	21	0.0%	0	0.0%	0	2.7%	0	1.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	23.4%	19	1.2%	0
Godalming town centre	4.1%	24	4.9%	1	5.7%	3	10.4%	1	8.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	63.2%	14
Guildford town centre	16.5%	96	83.5%	13	54.2%	26	38.2%	5	8.5%	5	28.8%	28	1.7%	2	3.6%	2	5.5%	3	9.9%	8	15.6%	4
Horsham town centre	7.3%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	80.7%	41	0.0%	0	0.0%	0
Leatherhead town centre	3.2%	19	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.7%	17	0.0%	0	0.0%	0	0.0%	0
London West End	1.4%	8	0.0%	0	0.0%	0	0.0%	0	3.4%	2	1.0%	1	1.0%	1	3.8%	2	0.0%	0	1.4%	1	1.4%	0
Weybridge town centre	6.3%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.1%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	7.2%	42	7.1%	1	2.2%	1	1.9%	0	0.0%	0	31.9%	31	5.2%	7	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Addlestone Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Albury Village Centre	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ash Vale Village Centre	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	5	0.0%	0
Ash Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Bagshot Town Centre	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Bournemouth Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bramley Village Centre	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Broadbridge Heath Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Byfleet Village Centre	2.8%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chertsey Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chessington Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Cobham Village Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Compton Village Centre	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Village Centre	1.4%	8	0.0%	0	0.0%	0	0.0%	0	14.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunsfold Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Horsley Village Centre	0.4%	2	0.0%	0	5.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Effingham Village Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Elstead Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Esher Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0
Farncombe Village Centre	0.1%	1	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0
Fetcham Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Grayswood Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Bookham Village Centre	1.1%	7	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	6	0.0%	0	0.0%	0	0.0%	0
Hambledon Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hanworth district Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hascombe Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0
Haslemere Town Centre	2.5%	15	0.0%	0	0.0%	0	0.0%	0	25.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hayling Island	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsell Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Horsley Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Knaphill Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ockham Village Centre	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ockley Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Ottershaw Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peaslake Village Centre	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Petersfield Town Centre	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pirbright Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Puttenham Village Centre	0.4%	3	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.2%	0
Pyrford Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Richmond-upon-Thames Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shamley Green Village Centre	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shere Village Centre	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walliswood Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames Town Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Byfleet Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westcott Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Windlesham Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wisley Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wonersh Village Centre	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wood Street Village Centre	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	25.6%	149	4.6%	1	17.3%	8	28.8%	4	31.2%	18	26.1%	26	34.9%	47	24.4%	15	12.1%	6	26.5%	21	14.3%	3
Weighted base:		583		16		48		13		57		99		136		62		51		79		22
Sample:		511		39		44		42		65		51		59		53		63		41		54

Guildford Household Survey
for Planning Perspectives

Q27 Where do you or members of your household normally go to a restaurant / cafe?
Those who go to restaurants / cafes at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldershot town centre	6.5%	54	0.0%	0	2.1%	2	1.1%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	32.7%	51	0.0%	0
Crawley town centre	0.5%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	2.0%	1	0.0%	0	0.0%	0
Dorking town centre	1.9%	16	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	16.7%	15	0.0%	0	0.0%	0	0.0%	0
Farnborough town centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	4	0.0%	0
Farnham town centre	6.5%	55	1.0%	0	1.2%	1	2.3%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.2%	52	1.0%	0
Godalming town centre	2.8%	23	1.0%	0	0.8%	1	14.2%	3	7.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	50.2%	13
Guildford town centre	20.7%	173	77.6%	24	63.4%	58	42.1%	9	16.4%	11	22.2%	31	3.1%	5	1.8%	2	0.6%	0	16.6%	26	26.0%	7
Horsham town centre	6.7%	56	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	85.5%	55	0.0%	0	0.0%	0
Kingston upon Thames town centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.6%	3	0.0%	0
Leatherhead town centre	4.1%	34	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.9%	32	0.0%	0	0.0%	0	0.0%	0
London West End	4.2%	35	4.6%	1	2.1%	2	3.6%	1	3.3%	2	5.2%	7	11.6%	17	2.5%	2	0.7%	0	0.9%	1	1.2%	0
Weybridge town centre	3.7%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	20.1%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	7.4%	62	3.7%	1	2.4%	2	1.1%	0	0.0%	0	34.5%	49	6.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Addlestone Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ascot Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ash Vale Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Bagshot Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bramley Village Centre	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Byfleet Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Camberley Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Chertsey Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clandon Village Centre	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cobham Village Centre	1.5%	13	0.0%	0	2.7%	2	0.0%	0	0.0%	0	2.7%	4	0.0%	0	6.9%	6	0.0%	0	0.0%	0	0.0%	0
Compton Village Centre	0.1%	1	1.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Village Centre	1.4%	11	0.0%	0	0.0%	0	4.3%	1	15.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Horsley Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Effingham Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Esher Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Exeter City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Farncombe Village Centre	0.1%	1	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Fleet Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Great Bookham Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Haslemere Town Centre	1.6%	13	0.0%	0	0.0%	0	0.0%	0	20.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mayfield Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Milford Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ockley Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Ottershaw Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ripley Village Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	1.1%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Shamley Green Village Centre	0.1%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shepperton Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shere Village Centre	0.2%	1	0.0%	0	0.8%	1	2.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
St John's Local Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staines-upon-Thames Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton-on-Thames Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Byfleet Village Centre	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	4.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westgate-on-Sea Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0
Windsor Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	23.2%	194	10.1%	3	20.6%	19	21.6%	5	32.6%	22	28.3%	40	40.4%	59	23.8%	21	11.2%	7	8.2%	13	18.3%	5
Weighted base:		835		31		91		22		66		141		146		90		64		156		26
Sample:		804		80		82		72		79		80		78		82		89		86		76

Q28 Where do you or members of your household normally go for family entertainment (e.g. Tenpin bowling, Skating Rink)?
Those who use family entertainment facilities at Q20

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldershot Bowling, Hippodrome House, Birchett Rd, Aldershot	3.0%	8	0.0%	0	14.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	6	0.0%	0
Guildford bowling club, Guildford	6.0%	16	0.0%	0	25.7%	4	85.6%	2	3.4%	1	0.0%	0	6.7%	4	4.9%	2	0.0%	0	5.3%	3	9.8%	1
Aldershot town centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Crawley town centre	2.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	26.9%	5	0.0%	0	0.0%	0
Dorking town centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Farnborough town centre	2.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	6	0.0%	0
Guildford town centre	38.1%	100	72.9%	4	54.7%	8	14.4%	0	64.6%	16	26.2%	11	20.2%	12	63.0%	21	13.8%	2	36.1%	21	56.1%	4
Horsham town centre	3.5%	9	0.0%	0	0.0%	0	0.0%	0	5.6%	1	0.0%	0	0.0%	0	0.0%	0	44.3%	8	0.0%	0	0.0%	0
London West End	1.6%	4	19.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	10.0%	26	0.0%	0	5.6%	1	0.0%	0	0.0%	0	33.3%	13	21.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basingstoke Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Camberley Town Centre	7.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	10.3%	6	0.0%	0	0.0%	0	22.2%	13	0.0%	0
Epsom Town Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	2	0.0%	0	0.0%	0	0.0%	0
Haslemere Town Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	5.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Legoland Windsor Resort, Winkfield Road, Windsor	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	2	0.0%	0	0.0%	0	0.0%	0
Northampton Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Portsmouth City Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	5.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sutton Green Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tolworth Town Centre	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	3	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	19.7%	52	7.4%	0	0.0%	0	0.0%	0	15.3%	4	38.0%	15	34.3%	20	8.1%	3	15.1%	3	8.2%	5	34.1%	2
Weighted base:		263		6		16		2		25		41		57		34		18		58		7
Sample:		192		12		10		5		28		27		23		22		23		26		16

Q29 Do you or your household do any other leisure activities not mentioned, if so what is the main activity you do?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Biking	0.9%	9	1.1%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	2.9%	5	1.9%	1
Bowls	0.6%	6	1.9%	1	0.7%	1	0.8%	0	1.1%	1	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.6%	1	1.5%	1
Camping	0.4%	4	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.4%	2	0.0%	0
Church	0.3%	3	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	1	0.0%	0	0.0%	0	1.8%	1
Cricket	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	3.3%	4	0.0%	0	0.6%	1	0.0%	0
Cycling	3.1%	31	0.9%	0	0.0%	0	2.9%	1	5.1%	4	7.2%	12	0.6%	1	1.4%	1	7.4%	5	2.4%	4	3.0%	1
Dancing	0.8%	8	0.8%	0	0.7%	1	0.0%	0	1.4%	1	1.0%	2	0.6%	1	1.6%	2	0.6%	0	0.0%	0	1.5%	1
Dog walking	0.3%	3	0.0%	0	0.0%	0	1.8%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.8%	0
Fishing	0.6%	6	0.0%	0	0.0%	0	1.2%	0	1.7%	1	0.0%	0	1.3%	2	0.9%	1	0.0%	0	0.6%	1	0.7%	0
Football	1.6%	16	0.0%	0	0.0%	0	0.0%	0	3.3%	3	1.6%	3	0.6%	1	0.0%	0	0.0%	0	5.0%	9	1.7%	1
Gardening	0.7%	7	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.4%	1	0.5%	1	1.7%	2	1.5%	1	0.0%	0	2.9%	1
Golf	3.4%	34	0.0%	0	3.6%	4	8.0%	2	7.0%	6	2.9%	5	2.4%	5	3.6%	4	2.6%	2	3.4%	6	1.8%	1
Hockey	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.6%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Horse riding	1.5%	15	0.0%	0	1.4%	2	1.2%	0	1.5%	1	5.7%	10	0.6%	1	0.7%	1	0.0%	0	0.0%	0	0.7%	0
Other	3.6%	36	3.2%	1	4.3%	5	3.9%	1	4.5%	4	0.6%	1	5.3%	10	1.9%	2	4.6%	3	4.7%	8	3.1%	1
Painting	0.2%	2	0.0%	0	0.7%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Running	0.4%	4	2.3%	1	1.6%	2	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Sailing	0.5%	5	0.0%	0	0.7%	1	1.2%	0	0.8%	1	0.4%	1	0.6%	1	0.7%	1	0.0%	0	0.0%	0	3.0%	1
Scouting	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.6%	1	0.8%	0
Shooting	1.3%	13	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.7%	10	0.0%	0	0.7%	1	1.5%	1	0.0%	0	0.8%	0
Swimming	3.6%	36	0.0%	0	2.8%	3	4.3%	1	3.5%	3	0.5%	1	3.4%	6	0.0%	0	6.6%	5	9.6%	16	0.8%	0
Tennis	1.4%	14	2.1%	1	0.7%	1	3.7%	1	3.0%	2	1.1%	2	0.0%	0	2.4%	3	0.8%	1	1.8%	3	1.6%	1
Walking	3.2%	32	2.7%	1	7.4%	8	2.3%	1	5.5%	4	4.5%	8	1.1%	2	2.3%	2	1.4%	1	2.5%	4	1.5%	1
Yoga	0.4%	4	0.0%	0	1.8%	2	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Don't do any other leisure activities	71.6%	718	82.0%	31	73.8%	82	67.8%	21	61.4%	49	67.3%	114	80.0%	149	78.4%	85	70.1%	50	65.8%	113	68.6%	25
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Q29BWhere do you or members of your household normally do this activity?
Those who do other leisure activities at Q29

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldershot town centre	6.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.7%	19	0.0%	0
Crawley town centre	0.7%	2	0.0%	0	0.0%	0	3.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	2	0.0%	0	0.0%	0
Dorking town centre	2.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	18.1%	4	1.9%	0	0.0%	0	0.0%	0
Farnham town centre	4.1%	12	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.3%	10	2.3%	0
Godalming town centre	3.1%	9	0.0%	0	0.0%	0	2.5%	0	6.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	58.1%	7
Guildford town centre	12.6%	36	46.4%	3	45.8%	13	38.1%	4	12.1%	4	5.8%	3	10.0%	4	6.3%	1	0.0%	0	4.0%	2	10.4%	1
Horsham town centre	5.3%	15	0.0%	0	0.0%	0	0.0%	0	4.6%	1	1.9%	1	0.0%	0	3.4%	1	55.8%	12	0.0%	0	0.0%	0
Leatherhead town centre	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.0%	4	0.0%	0	0.0%	0	0.0%	0
London West End	1.6%	5	0.0%	0	0.0%	0	0.0%	0	4.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	3	0.0%	0
Weybridge town centre	1.4%	4	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	7.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woking town centre	14.0%	40	5.1%	0	2.6%	1	0.0%	0	0.0%	0	59.4%	33	15.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.5%	1	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashford Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	1	0.0%	0	0.0%	0	0.0%	0
Bramley Village Centre	0.1%	0	0.0%	0	0.0%	0	3.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camberley Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chertsey Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clandon Village Centre	0.2%	1	4.4%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cobham Village Centre	0.3%	1	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranleigh Village Centre	2.5%	7	0.0%	0	0.0%	0	12.0%	1	14.6%	5	0.0%	0	0.0%	0	3.4%	1	2.7%	1	0.0%	0	0.0%	0
Dunsfold Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0
Eastbourne Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Elstead Village Centre	1.6%	4	0.0%	0	2.6%	1	0.0%	0	4.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0
Ewshot Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
Farley Green Village Centre	0.1%	0	0.0%	0	0.0%	0	3.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fetcham Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	1	0.0%	0	0.0%	0	0.0%	0
Frensham Village Centre	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	0
Haslemere Town Centre	1.9%	5	0.0%	0	0.0%	0	0.0%	0	17.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henfield Village Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	0	0.0%	0	0.0%	0
Hoebridge Local Centre	0.3%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirdford Village Centre	0.1%	0	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knaphill Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leicester City Centre	0.2%	0	6.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lightwater Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lyne Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merrist Wood Village Centre	0.5%	1	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Milford Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mytchett Village Centre	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0
Onslow Village Centre	0.3%	1	10.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ottershaw Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peaslake Village Centre	0.2%	1	0.0%	0	0.0%	0	6.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poole Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ripley Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shamley Green Village Centre	0.1%	0	0.0%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Shepperton Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shere Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0
Surrey Hills	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Swinley Forest	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Teddington Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warnham Village Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	1	0.0%	0	0.0%	0
West Byfleet Village Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Clandon Village Centre	0.3%	1	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Molesey Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	0
Whiteley Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	0
Windlesham Village Centre	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	26.9%	76	26.9%	2	37.2%	11	17.2%	2	26.7%	8	25.5%	14	21.0%	8	36.6%	9	23.3%	5	27.4%	16	19.8%	2
Weighted base:		284		7		29		10		31		55		37		23		21		59		12
Sample:		302		18		29		29		42		25		27		25		34		36		37

Q30 What improvements could be made to Guildford Borough's leisure offer that would make you visit / partake in leisure activities more often? [MR]

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
A casino	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A swimming pool	1.8%	18	2.1%	1	0.0%	0	0.9%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	2.2%	2	7.5%	13	0.7%	0
A theatre	1.0%	10	0.0%	0	1.7%	2	5.0%	2	1.4%	1	0.0%	0	0.0%	0	3.3%	4	1.5%	1	0.0%	0	1.8%	1
An art house cinema	0.6%	6	0.9%	0	0.7%	1	3.8%	1	2.4%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.8%	0
Better cinema provision e.g. new multi-screen	0.4%	4	0.0%	0	0.7%	1	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.5%	1	0.0%	0	0.0%	0
Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper prices	4.3%	43	0.0%	0	6.6%	7	15.0%	5	5.8%	5	1.6%	3	3.9%	7	5.8%	6	1.9%	1	3.6%	6	8.1%	3
Improved access by foot and cycle	0.7%	7	0.0%	0	1.8%	2	1.8%	1	3.4%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Improved public transport	0.7%	7	0.0%	0	0.7%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	3.7%	4	0.7%	0	0.0%	0	3.4%	1
Improved security / CCTV	0.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.7%	0
Improved street furniture	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvements in the built environment	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
More / better car parking	5.2%	53	3.7%	1	3.9%	4	6.2%	2	6.1%	5	2.1%	4	6.2%	12	3.1%	3	11.1%	8	7.3%	13	3.3%	1
More / better cultural facilities	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better disabled access	0.3%	3	1.7%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
More / better health clubs / gyms	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better policing	0.2%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public houses	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better seats	0.1%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
More / better signposting and information	0.6%	6	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.1%	2	0.0%	0	0.7%	1	0.8%	1	0.6%	1	0.0%	0
More better parks / green spaces	0.4%	4	0.9%	0	1.6%	2	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
More for children	0.7%	7	1.1%	0	1.8%	2	2.0%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.3%	2	0.8%	0
More local sports & recreation facilities	0.4%	4	0.0%	0	0.8%	1	1.9%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
More nightclubs	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More pavement cafes	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More quality restaurants	0.4%	4	2.1%	1	1.0%	1	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More street cleaning	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Provision of public toilets	0.2%	2	0.0%	0	1.8%	2	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ten Pin Bowling	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	4.8%	48	9.7%	4	5.7%	6	3.9%	1	6.8%	5	2.1%	4	2.5%	5	4.7%	5	1.5%	1	9.1%	16	3.0%	1
Cheaper parking	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	11.9%	20	3.0%	1
Ice rink / skating	1.6%	16	0.0%	0	0.0%	0	0.0%	0	1.8%	1	6.2%	10	0.0%	0	0.0%	0	1.3%	1	1.8%	3	0.0%	0
If it was closer to home	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.7%	1	0.8%	1	0.0%	0	0.0%	0
Indoor tennis facilities	0.4%	4	2.3%	1	0.8%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Less traffic	0.2%	2	3.7%	1	0.0%	0	0.9%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Make it more accessible	0.5%	5	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.1%	4	0.0%	0
More choice in general	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.5%	1	1.4%	3	1.8%	2	0.0%	0	0.0%	0	1.6%	1

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
More for older people	0.3%	3	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
More informaion / advertising about leisure activities	0.9%	9	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.0%	3	2.2%	2	1.3%	2	0.0%	0
More music events	0.3%	3	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	0	0.0%	0	0.0%	0
Special offers	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	1.6%	2	1.5%	1	1.5%	3	0.0%	0
(Don't know)	9.5%	95	6.5%	2	15.3%	17	7.8%	2	2.4%	2	6.0%	10	14.5%	27	7.1%	8	6.4%	5	11.4%	20	6.2%	2
Don't do leisure activities	3.4%	34	5.5%	2	4.0%	4	7.7%	2	2.0%	2	5.7%	10	1.1%	2	6.5%	7	3.9%	3	0.6%	1	2.7%	1
Nothing	61.1%	612	61.0%	23	54.2%	60	50.2%	15	68.9%	55	73.5%	125	68.0%	126	55.7%	60	61.1%	43	46.4%	80	66.9%	25
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

GEN Gender of respondent

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Male	33.6%	336	42.7%	16	38.3%	43	28.3%	9	30.4%	24	35.5%	60	34.8%	65	26.3%	28	33.5%	24	30.9%	53	39.7%	15
Female	66.4%	666	57.3%	22	61.7%	69	71.7%	22	69.6%	56	64.5%	109	65.2%	121	73.7%	80	66.5%	47	69.1%	119	60.3%	22
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

AGE Can I just ask, how old are you?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
18-24	4.9%	49	7.7%	3	6.6%	7	2.6%	1	0.0%	0	5.5%	9	3.4%	6	8.2%	9	5.5%	4	5.4%	9	2.4%	1
25-34	19.0%	190	0.0%	0	9.1%	10	0.0%	0	9.0%	7	34.2%	58	28.5%	53	8.5%	9	15.2%	11	22.4%	39	9.9%	4
35-44	20.0%	201	6.3%	2	14.4%	16	12.9%	4	23.1%	18	25.7%	44	19.6%	36	21.8%	23	27.0%	19	19.1%	33	11.7%	4
45-54	18.0%	180	12.0%	4	13.3%	15	17.9%	5	30.9%	25	12.7%	22	18.3%	34	17.5%	19	19.6%	14	21.2%	36	16.9%	6
55-64	16.5%	165	25.2%	9	24.3%	27	18.7%	6	15.4%	12	15.2%	26	9.1%	17	19.1%	21	20.3%	14	16.0%	27	14.7%	5
65+	19.9%	199	44.8%	17	31.2%	35	46.5%	14	19.5%	16	6.8%	11	18.5%	34	20.9%	23	12.5%	9	15.0%	26	39.7%	15
(Refused)	1.7%	17	3.9%	1	1.1%	1	1.3%	0	2.2%	2	0.0%	0	2.6%	5	4.1%	4	0.0%	0	0.9%	2	4.7%	2
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

ADU How many adults aged 16 years and over, including yourself, live in your household?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
One	17.8%	178	30.4%	11	22.5%	25	25.0%	8	17.4%	14	16.6%	28	16.8%	31	15.7%	17	9.5%	7	16.9%	29	22.3%	8
Two	53.6%	537	52.6%	20	37.1%	41	56.2%	17	54.2%	43	57.1%	97	53.2%	99	51.7%	56	58.8%	42	60.7%	105	48.6%	18
Three	14.5%	146	6.8%	3	17.1%	19	9.4%	3	15.0%	12	14.9%	25	16.8%	31	14.9%	16	21.5%	15	9.5%	16	13.4%	5
Four or more	10.3%	104	7.6%	3	12.2%	14	8.0%	2	9.1%	7	10.1%	17	8.5%	16	12.9%	14	8.3%	6	11.9%	21	10.7%	4
(Refused)	3.8%	38	2.6%	1	11.0%	12	1.3%	0	4.2%	3	1.4%	2	4.6%	9	4.7%	5	1.9%	1	0.9%	2	5.0%	2
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

CHI How many children aged 15 years and under, live in your household?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
None	61.0%	612	82.5%	31	66.3%	74	85.5%	26	64.1%	51	54.4%	92	57.5%	107	60.6%	65	57.6%	41	55.5%	96	78.2%	29
One	16.0%	161	9.1%	3	16.3%	18	2.7%	1	15.0%	12	22.2%	38	13.6%	25	13.8%	15	9.6%	7	22.7%	39	7.0%	3
Two	15.3%	153	4.9%	2	6.3%	7	8.3%	3	12.7%	10	18.2%	31	20.1%	37	15.8%	17	18.2%	13	18.0%	31	5.5%	2
Three	3.4%	35	0.9%	0	0.0%	0	2.2%	1	1.4%	1	3.8%	6	4.2%	8	3.3%	4	12.1%	9	2.9%	5	2.8%	1
Four or more	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	1.7%	2	0.7%	0	0.0%	0	0.0%	0
(Refused)	3.8%	38	2.6%	1	11.0%	12	1.3%	0	4.2%	3	1.4%	2	4.6%	9	4.7%	5	1.9%	1	0.9%	2	6.5%	2
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

CAR How many cars does your household own or have the use of?

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
None	5.2%	52	17.4%	7	5.4%	6	10.7%	3	5.1%	4	2.8%	5	5.5%	10	3.0%	3	3.6%	3	3.0%	5	17.0%	6
One	31.6%	317	45.5%	17	28.7%	32	34.7%	11	31.0%	25	37.7%	64	25.9%	48	26.1%	28	18.3%	13	38.5%	66	35.2%	13
Two	43.5%	436	26.5%	10	36.1%	40	38.7%	12	43.1%	35	42.2%	72	45.7%	85	45.9%	50	60.3%	43	45.5%	78	33.3%	12
Three or more	16.4%	165	8.0%	3	18.8%	21	13.7%	4	18.0%	14	16.0%	27	19.8%	37	20.7%	22	16.5%	12	12.1%	21	9.5%	4
(Refused)	3.3%	33	2.6%	1	11.0%	12	2.1%	1	2.9%	2	1.4%	2	3.1%	6	4.4%	5	1.3%	1	0.9%	2	5.0%	2
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

QUOTA Zone

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Zone 1A	3.7%	38	100.0%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 1B	11.1%	111	0.0%	0	100.0%	111	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 1C	3.0%	30	0.0%	0	0.0%	0	100.0%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	8.0%	80	0.0%	0	0.0%	0	0.0%	0	100.0%	80	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	16.9%	170	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	170	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	18.5%	186	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	186	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	10.8%	108	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	108	0.0%	0	0.0%	0	0.0%	0
Zone 6	7.1%	71	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	71	0.0%	0	0.0%	0
Zone 7	17.2%	172	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	172	0.0%	0
Zone 8	3.7%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	37
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37
Sample:		1002		100		101		100		101		100		100		100		100		100		100

Guildford Household Survey for Planning Perspectives

PC Postcode

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
GU1 1	0.4%	4	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU1 2	1.8%	18	0.0%	0	16.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU1 3	0.7%	7	18.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU1 4	0.6%	6	16.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU101	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	6	0.0%	0
GU102	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
GU103	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	9	0.0%	0
GU104	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	11	0.0%	0
GU105	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
GU111	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	6	0.0%	0
GU113	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.8%	25	0.0%	0
GU124	3.5%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.2%	35	0.0%	0
GU125	2.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.8%	29	0.0%	0
GU126	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	21	0.0%	0
GU185	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU195	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU2 4	0.9%	9	23.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU2 7	1.6%	16	41.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU2 8	0.8%	8	0.0%	0	7.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU2 9	1.1%	11	0.0%	0	10.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU206	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU212	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU213	4.8%	48	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.2%	48	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU214	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU215	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU216	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU217	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU218	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU220	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU228	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU229	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU236	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU237	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU240	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU248	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU249	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU271	1.9%	20	0.0%	0	0.0%	0	0.0%	0	24.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU272	1.1%	11	0.0%	0	0.0%	0	0.0%	0	13.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU273	0.9%	9	0.0%	0	0.0%	0	0.0%	0	11.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU3 1	0.4%	4	0.0%	0	0.0%	0	11.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU3 2	1.0%	10	0.0%	0	9.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU3 3	0.8%	8	0.0%	0	7.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU4 7	2.8%	28	0.0%	0	25.0%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU4 8	1.0%	11	0.0%	0	0.0%	0	34.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU5 0	0.9%	9	0.0%	0	0.0%	0	30.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1A		Zone 1B		Zone 1C		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
GU5 9	0.7%	7	0.0%	0	0.0%	0	23.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU6 7	1.3%	13	0.0%	0	0.0%	0	0.0%	0	16.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU6 8	0.7%	7	0.0%	0	0.0%	0	0.0%	0	8.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU7 1	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.1%	14
GU7 2	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.3%	10
GU7 3	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	34.6%	13
GU8 4	0.5%	5	0.0%	0	0.0%	0	0.0%	0	6.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU8 5	1.0%	10	0.0%	0	0.0%	0	0.0%	0	12.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU8 6	0.4%	5	0.0%	0	0.0%	0	0.0%	0	5.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
GU9 0	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
GU9 7	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
GU9 8	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	16	0.0%	0
GU9 9	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	7	0.0%	0
KT111	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT112	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT113	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT130	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT138	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT139	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT146	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT147	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT151	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.4%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT152	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT153	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT160	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT168	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT169	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT220	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	8	0.0%	0	0.0%	0	0.0%	0
KT227	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	8	0.0%	0	0.0%	0	0.0%	0
KT228	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
KT229	3.0%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.6%	30	0.0%	0	0.0%	0	0.0%	0
KT233	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	7	0.0%	0	0.0%	0	0.0%	0
KT234	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	13	0.0%	0	0.0%	0	0.0%	0
KT245	0.9%	9	0.0%	0	8.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
KT246	1.4%	14	0.0%	0	12.7%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
RH121	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.3%	9	0.0%	0	0.0%	0
RH122	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.1%	21	0.0%	0	0.0%	0
RH123	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.7%	10	0.0%	0	0.0%	0
RH124	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.4%	12	0.0%	0	0.0%	0
RH125	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.4%	18	0.0%	0	0.0%	0
RH4 1	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	3	0.0%	0	0.0%	0	0.0%	0
RH4 2	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4	0.0%	0	0.0%	0	0.0%	0
RH4 3	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
RH5 4	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	6	0.0%	0	0.0%	0	0.0%	0
RH5 5	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	15	0.0%	0	0.0%	0	0.0%	0
RH5 6	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	8	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1002		38		111		30		80		170		186		108		71		172		37

	Total	Zone 1A	Zone 1B	Zone 1C	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Sample:	1002	100	101	100	101	100	100	100	100	100	100

APPENDIX 6: RETAILER REQUIREMENTS

Company Name:	Bensons For Beds	**Retailer Type:**	Department & Variety Stores, Textiles & Soft Furnishings
Address:	4 Taurus Park Europa Boulevard, Westbrook, Warrington, WA5 7ZT	**Contact:**	Phill Williamson
Email:	philw@homestylegroup.com	**Telephone:**	0808 144 6160
Requirements size:	3,500 - 7,500 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Bensons for Beds are seeking new retail space on main arterial roads with prominent roadside frontage. Particular units of interest: sublets/down sizes, solus units, retail parks, showrooms, petrol forecourts.		
Initial Research Date:	04 Jun 2014	**Last Update Date:**	17 Jul 2014
Agent:	**Smart4 Ltd**	**Telephone:**	02075699900
Agent Address:	3 Hanover Square, London, W1S 1HD		
Contact:	**Oliver Church** 02075699900 628480@costar.co.uk		

Company Name:	Bensons For Beds	**Retailer Type:**	Department & Variety Stores, Textiles & Soft Furnishings
Address:	4 Taurus Park Europa Boulevard, Westbrook, Warrington, WA5 7ZT	**Contact:**	Phill Williamson
Email:	philw@homestylegroup.com	**Telephone:**	0808 144 6160
Requirements size:	5,000 - 8,000 sq ft	**Use:**	A1
Outlets Required:	Friary Centre, Guildford; Guildford		
Location:	Prime, out of Town		
Notes:	Bensons for Beds will consider retail parks, high streets and good secondary locations.		
Initial Research Date:	30 Jan 2012	**Last Update Date:**	28 Jul 2014
Agent:	**Mason & Partners**	**Telephone:**	01512271008
Agent Address:	Corn Exchange, Brunswick	Street, Liverpool, L2 0PJ	
Contact:	**Chris Chetwood** 01512250108 chrischetwood@masonpartners	**Andrew Moore** 01512358826 andrewmoore@masonpartners.com	
Agent:	**Mason & Partners**	**Telephone:**	02074951971
Agent Address:	Maddox House 1 Maddox Street, London, W1S 1PZ		
Contact:	**Stephen Morris** 02074951971 stephenmorris@masonpartners.com		

Company Name:	Cafe Copia	**Retailer Type:**	Cafes
Address:	The Courtyard, 60 Station Road, Marlow, SL7 1NX	**Contact:**	
Email:		**Telephone:**	01628 298 595
Requirements size:	1,000 - 1,500 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Café Copia is looking to acquire new A1 or A3 units from 1,000-1,500 sq ft in affluent suburbs and or market towns with high footfall.		
Initial Research Date:	13 Sep 2012	**Last Update Date:**	08 Apr 2014
Agent:	**CBRE Ltd**	**Telephone:**	02071822000
Agent Address:	Henrietta House Henrietta Place, London, W1G 0NB		
Contact:	**Neil Davies** 02071822464 neil.davies@cbre.com		

Company Name:	Wellness Pilates	**Retailer Type:**	MIscellaneous, Leisure
Address:	Stanborough Road, Welwyn Garden City, AL8 6DQ	**Contact:**	
Email:		**Telephone:**	01707330500
Requirements size:	1,500 - 5,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Retail Requirement for Wellness Pilates - Within 20 miles of the North/West and South parts of the M25 - From 1,500 - 5,000 sq ft; the first floor and basement of interest with some prominence - Properties sought in secondary shopping locations in affluent parts of London - Potential for change of use to D2 required - Freehold or Leasehold		
Last Update Date:	29 Jul 2014		
Agent:	**Brasier Freeth LLP**	**Telephone:**	01707392080
Agent Address:	Wentworth Lodge Great North Road, Welwyn Garden City, AL8 7SR		
Contact:	**James Oliver** 01707392080 james.oliver@brasierfreeth.com		

Company Name:	A1 Requirement	**Retailer Type:**	
Address:	C/O Brasier Freeth LLP, 77 - 79 Marlowes, Hemel Hempstead, HP1 1LW	**Contact:**	
Email:		**Telephone:**	HP1 1LW
Requirements size:	1,200 - 1,800 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Prime / busy footfall. Ideally to have an internal width of 23ft.		
Initial Research Date:	12 Dec 2012	**Last Update Date:**	29 Jul 2014
Agent:	**Brasier Freeth LLP**	**Telephone:**	01923210810
Agent Address:	Edward Hyde Building, 38 Clarendon Road, Watford, WD17 1HZ		
Contact:	**Tim Frost** 01923205512 tim.frost@brasierfreeth.com		

Company Name:	Porcelanosa	**Retailer Type:**	
Requirements size:	4,000 - 10,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Porcelanosa are seeking 4,000 - 10,000 sq ft. Non food user.		
Initial Research Date:	31 Oct 2013	**Last Update Date:**	21 Jul 2014
Agent:	**Brasier Freeth LLP**	**Telephone:**	01923210810
Agent Address:	Edward Hyde Building, 38 Clarendon Road, Watford, WD17 1HZ		
Contact:	**Tim Frost** 01923205512 tim.frost@brasierfreeth.com		

Company Name:	Sue Ryder Care	**Retailer Type:**	Charity Shops
Address:	1st Floor Kings House, King Street, Sudbury, CO10 2ED	**Contact:**	Elizabeth Jarmin
Email:	elizabeth.jarmin@suerydercare.org	**Telephone:**	01787 314200
Requirements size:	800 - 2,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	40 stores required. Market rents paid. High Street/Local Parade/Edge of Town/Retail Parks.		
Initial Research Date:	25 Oct 2012	**Last Update Date:**	01 Aug 2014
Agent:	**Capita Property & Infrastructure Ltd**	**Telephone:**	
Agent Address:	125 Shaftesbury Avenue, London, WC2H 8AD		
Contact:	**Sarah Wallis** 020 7544 2098 s.wallis@capita.co.uk		

Company Name:	Sue Ryder Care	**Retailer Type:**	Charity Shops
Address:	1st Floor Kings House, King Street, Sudbury, CO10 2ED	**Contact:**	Elizabeth Jarmin
Email:	elizabeth.jarmin@suerydercare.org	**Telephone:**	01787 314200
Requirements size:	2,000 - 7,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	40 large format stores required. Market rents paid. High Street/Local Parade/Edge of Town/Retail Parks.		
Initial Research Date:	25 Oct 2012	**Last Update Date:**	01 Aug 2014
Agent:	**Capita Property & Infrastructure Ltd**	**Telephone:**	
Agent Address:	125 Shaftesbury Avenue, London, WC2H 8AD		
Contact:	**Sarah Wallis** 020 7544 2098 s.wallis@capita.co.uk		

Company Name:	Hatton Goldsmiths	**Retailer Type:**	Jewellery, Watches & Silver
Address:	18A Lower Mall Weston Favell Centre, Northampton, NN3 8JZ	**Contact:**	Tony Nolan
Email:	tony@hattongoldsmiths.co.uk	**Telephone:**	07970 742076
Requirements size:	100 - 500 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Retail units required between 100-500 sq ft in shopping centres and prime high street locations.		
Last Update Date:	21 Feb 2013		

Company Name:	Polarn O Pyret	**Retailer Type:**	Childrens & Infants Wear
Requirements size:	1,250 - 1,500 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Polarn O Pyret is looking to acquire between 1,250-1,500 sq ft of retail space throughout the Southeast of England.		
Initial Research Date:	26 Mar 2009	**Last Update Date:**	27 Feb 2013
Agent:	**Stephen Kane & Company**	**Telephone:**	02072240101
Agent Address:	61 Queen Anne Street, London, W1G 9HH		
Contact:	**Stephen Kane** 020 7224 0101 sk@stephenkane.co.uk		

Company Name:	Princesse tam.tam	**Retailer Type:**	
Requirements size:	592 - 645 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Princesse tam.tam is a French lingerie retailer and sister company of Uniqlo, part of the Japanese group Fast Retailing. They require A1 stores predominantly in the Greater London area or principle cities ranging from 592-645 sq ft.		
Initial Research Date:	14 Apr 2009	**Last Update Date:**	27 Feb 2013
Agent:	**Harper Dennis Hobbs**	**Telephone:**	02074629100
Agent Address:	Langham House 302-308 Regent Street, London, W1B 3AT		
Contact:	**James Ebel** 02074629108 jamesebel@hdh.co.uk		

Company Name:	Fossil	**Retailer Type:**	Jewellery, Watches & Silver
Address:	29 James Street Covent Garden, London, WC2E 8PA	**Contact:**	
Email:		**Telephone:**	020 7836 5400
Requirements size:	600 - 1,200 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Fossil is currently looking to acquire retail units throughout the UK and Ireland. They are looking for A1 retail units ranging from 600-1,200 sq ft.		
Initial Research Date:	16 Jun 2009	**Last Update Date:**	27 Feb 2013
Agent:	**Harper Dennis Hobbs**	**Telephone:**	02074629100
Agent Address:	Langham House 302-308 Regent Street, London, W1B 3AT		
Contact:	**Jason Atherton** 02074629117 jasonatherton@hdh.co.uk		

Company Name:	Pavilion Clothing Limited	**Retailer Type:**	Fashion, Ladieswear & Accessories, Menswear & Accessories
Address:	81 High Street, Winchester, SO23 9AP	**Contact:**	
Email:		**Telephone:**	01962 890707
Requirements size:	1,200 - 2,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Require: 1200 - 2000 sqft plus back-up. Rent: Market rents paid. Winchester - re-location, prime/good secondary.		
Initial Research Date:	27 Apr 2011	**Last Update Date:**	27 Feb 2013
Agent:	**Jp Retail Ltd**	**Telephone:**	02070390130
Agent Address:	Linen Hall, 162-168 Regent Street, London, W1B 5TG		
Contact:	**James Peasnell** 02070390132 james@jpretail.co.uk		

Company Name:	GH Pressley & Sons	**Retailer Type:**	Jewellery, Watches & Silver
Address:	44 46 South Street, Worthing, BN11 3AA	**Contact:**	
Email:		**Telephone:**	01903 238997
Requirements size:	300 - 750 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	They are seeking a flagship diamond store in central London. Target locations include Mayfair, St James, Kensington and Knightsbridge. Brands will include Hans D Krieger and Marco Bicego.		
Initial Research Date:	24 Aug 2012	**Last Update Date:**	27 Feb 2013
Agent:	**Jp Retail Ltd**	**Telephone:**	02070390130
Agent Address:	Linen Hall, 162-168 Regent Street, London, W1B 5TG		
Contact:	**James Peasnell** 02070390132 james@jpretail.co.uk		

Company Name:	Oxygen Red Ltd	**Retailer Type:**	Ladieswear & Accessories
Address:	8 Ashby Square, Loughborough, LE11 5AA	**Contact:**	
Email:		**Telephone:**	01509 267 501
Requirements size:	2,000 - 00 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Oxygen Red is looking to acquire temporary stores in Shopping Centre locations within the M25. Units must be a minimum of 2,000 sq ft with ancillary space. The retailer is flexible on occupancy from 6-24 months.		
Initial Research Date:	01 May 2012	**Last Update Date:**	28 Feb 2013
Agent:	**Hordern Ryan Ltd**	**Telephone:**	02074990343
Agent Address:	78 Duke Street, Mayfair, London, W1K 6JQ		
Contact:	**Dermot Morrogh-Ryan** 02074990343 dermot@hordernryan.com		

Company Name:	Linens Direct UK Ltd	**Retailer Type:**	Haberdashery
Requirements size:	2,000 - 3,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Minimum internal width – 26 ft.		
Initial Research Date:	25 Jun 2009	**Last Update Date:**	05 Mar 2013
Agent:	**Brasier Freeth LLP**	**Telephone:**	01923210810
Agent Address:	Edward Hyde Building, 38 Clarendon Road, Watford, WD17 1HZ		
Contact:	**Russell Jerrard** 01923205513 russell.jerrard@brasierfreeth.com	**Anthony Appleby** 01923205508 anthony.appleby@brasierfreeth.com	

Company Name:	Comptoir des Cotonniers	**Retailer Type:**	Fashion, Ladieswear & Accessories
Requirements size:	600 - 1,500 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Upper/Middle Market Fashion Pitch.		
Initial Research Date:	13 Jul 2009	**Last Update Date:**	13 Mar 2013
Agent:	**Kitchen La Frenais Morgan**	**Telephone:**	02073173700
Agent Address:	Langham House 308 Regent Street, London, W1B 3AT		
Contact:	**Mostafa Sbitri** 020 7317 3720 msbitri@klmproperty.co.uk		
Agent:	**Michael Horwitz Associates**	**Telephone:**	020 7629 4774
Agent Address:	23 Old Bond Street, London, W1S 4PZ		
Contact:	**Michael Horwitz** 020 7629 4774 mh@michaelhorwitz.com		

Company Name:	KIKO	**Retailer Type:**	
Requirements size:	500 - 1,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Prime central London sites and top 50 shopping centres considered.		
Initial Research Date:	19 Feb 2009	**Last Update Date:**	13 Mar 2013
Agent:	**Kitchen La Frenais Morgan**	**Telephone:**	02073173700
Agent Address:	Langham House 308 Regent Street, London, W1B 3AT		
Contact:	**James Andrews** 02073173708 jandrews@klmproperty.co.uk	**Mostafa Sbitri** 02073173720 msbitri@klmproperty.co.uk	
Agent:	**Kitchen La Frenais Morgan**	**Telephone:**	02073173700
Agent Address:	Langham House 308 Regent Street, London, W1B 3AT		
Contact:	**William Thomas** 02073173717 wthomas@klmproperty.co.uk		

Company Name:	Triumph International	**Retailer Type:**	Ladieswear & Accessories
Address:	Arkwright Road Groundwell, Swindon, SN25 5BE	**Contact:**	Mark Hayes
Email:	mark.hayes@triumph.co.uk	**Telephone:**	01793 722 200
Requirements size:	1,500 - 2,500 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Triumph is looking for new retail units in London and the South. A1 retail units ranging from 1,500-2,500 sq ft are required.		
Initial Research Date:	04 Nov 2011	**Last Update Date:**	13 Mar 2013
Agent:	**Kitchen La Frenais Morgan**	**Telephone:**	02073173700
Agent Address:	Langham House 308 Regent Street, London, W1B 3AT		
Contact:	**James Andrews** 02073173708 jandrews@klmproperty.co.uk		

Company Name:	tReds Ltd	**Retailer Type:**	Footwear
Address:	48 Lynch Lane, Weymouth, Dorset, DT4 9DN	**Contact:**	
Email:		**Telephone:**	0800 635 0021
Requirements size:	1,000 - 1,750 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	tReds Ltd is looking to acquire A1 retail units in a number of locations throughout England. Units should have a minimum of 1,000 sq ft main sales and 500 sq ft ancillary space.		
Initial Research Date:	10 May 2012	**Last Update Date:**	24 Jun 2013
Agent:	**Kitchen La Frenais Morgan**	**Telephone:**	02073173700
Agent Address:	Langham House 308 Regent Street, London, W1B 3AT		
Contact:	**William Thomas** 02073173717 wthomas@klmproperty.co.uk		

Company Name:	Chiquito	**Retailer Type:**	Restaurants
Address:	5-7 Marshalsea Road, London, SE1 1EP	**Contact:**	
Email:		**Telephone:**	0845 612 5004
Requirements size:	3,700 - 5,000 sq ft	**Use:**	A3
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	A3 sites required for continued expansion programme. Ideal unit size: 3,700 - 5,000 sqft. Leisure Parks/Retail parks/ In-Town Schemes/Regional Shopping Centres/Mixed Use/Main Arterial Roads. All opportunities considered: Leasehold/Freehold - min size 0.5 acre. Strong covenant - Part of The Restaurant Group plc. Introduction fee: £20,000 - available to non-retained agents.		
Initial Research Date:	26 Jul 2011	**Last Update Date:**	18 Mar 2013
Agent:	**Reis Short & Co Ltd**	**Telephone:**	0131 557 3662
Agent Address:	13 Great King Street, Edinburgh, EH3 6QW		
Contact:	**Chris Reis** 07977 108 004 chris@reisshort.co.uk		
Agent:	**Wareing & Partners**	**Telephone:**	020 7409 0022
Agent Address:	Unit 6, 30 Bramham Gardens, London, SW5 0HF		
Contact:	**Nathan Wareing** 02074090022 nathan@wareingpartners.com		

Company Name:	American Golf	**Retailer Type:**	Discount Stores, Sports/Outdoor Leisure
Address:	1030 Europa Boulevard Westbrook, Warrington, WA5 7YW	**Contact:**	
Email:		**Telephone:**	01925 488 400
Requirements size:	2,500 - 5,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, out of Town		
Notes:	Edge of town frontage preferred.		
Initial Research Date:	09 Jun 2009	**Last Update Date:**	27 Mar 2013
Agent:	**Arctotis Property**	**Telephone:**	01684579194
Agent Address:	The Studio 59A Church Street, Great Malvern, WR14 2AA		
Contact:	**Brian Lumb** 01684579194 brianlumb@arctotis.co.uk		

Company Name:	Trailfinders	**Retailer Type:**	Travel Agents
Address:	c/o Lewis Craig, 66 Great Cumberland Place, London, W1H 8DU	**Contact:**	
Email:		**Telephone:**	
Requirements size:	1,500 - 2,500 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Acting on behalf of Trailfinders, established in 1970, the UK's largest independent travel agency operating from a network of regional branches, we are instructed to seek additional premises for 2013/2014. Freehold opportunities preferred		
Last Update Date:	22 Apr 2013		
Agent:	**Lewis Craig**	**Telephone:**	02070090480
Agent Address:	31 Welbeck Street, London, W1G 8ET		
Contact:	**Richard Grossman** 02070090482 rg@lewiscraig.co.uk		

Company Name:	Vets4Pets Ltd	**Retailer Type:**	MIscellaneous, Out Of Town, Unclassified
Address:	Supports Centre, Les Merriennes, St Martins, Guernsey, GY4 6NS	**Contact:**	Hannah Thornton
Email:	property@vets4pets.com	**Telephone:**	01481 239 200
Requirements size:	1,000 - 2,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, out of Town		
Notes:	Primary Requirements: - 1,200 - 2000 sq ft on ground floor - On site parking with 6-8 spaces - Arterial roadside locations - Densely populated suburban areas - D1 use - planning friendly. We also have the following secondary requiremements: Leasehold or freehold - Conversion or new build - 15 year lease terms with 5 yearly rent reviews - Rent up to £15 per sq ft. Suitable sites include: Car showrooms, Former petrol stations, Suburban retail units, Convenience and video stores, Public houses, Surplus land on leisure or pub sites.		
Last Update Date:	06 May 2013		

Company Name:	Majai	**Retailer Type:**	Bakers & Confectioners, Confectionery/Icecream
Address:	C/O Capa, 37 Duke Street, London, W1U 1LN	**Contact:**	
Email:		**Telephone:**	
Requirements size:	1,050 - 00 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Majai currently trade from 14 stores in Lithuania and are now seeking prime stores in the UK ASAP. Locations are sought on the high street or in shopping centres with rent between £50,000-£100,000 per annum. Ideal locations will comprise 650 sq ft sales area and 400 sq ft back up.		
Last Update Date:	08 Jul 2013		
Agent:	**Capa**	**Telephone:**	02072247222
Agent Address:	37 Duke Street, London, W1U 1LN		
Contact:	**Thomas Nulty** 02072247222 thomas@capa.uk.com		

Company Name:	Jollyes	**Retailer Type:**	Pet Stores
Address:	Aberach House, 17 Savile Row, London, W1S 3PN	**Contact:**	
Email:		**Telephone:**	020 7758 0400
Requirements size:	5,000 - 6,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	OTHER TOWNS CONSIDERED. OPPORTUNITIES: STANDALONE RETAIL UNITS AND/OR TRADE COUNTER UNITS NEAR TO RETAIL PITCHES / ON RETAIL PARKS.		
Last Update Date:	03 Sep 2013		
Agent:	**Edgerley Simpson Howe & Partners**	**Telephone:**	02077580400
Agent Address:	17 Savile Row, London, W1S 3PN		
Contact:		**Lauren Chew** 02077580413 lauren@eshp.com	

Company Name:	Fashion Retailer	**Retailer Type:**	Fashion
Address:	C/O Ian Scott International, 20 Berkeley Street, London, W1J 8EE	**Contact:**	
Email:		**Telephone:**	020 7297 6456
Requirements size:	2,500 - 5,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	My client is an established Retailer with shops within London & South East who is looking to open a chain of stores selling competitively priced branded / non branded fashion wear. Requirement is for fashion fitted shops of between 2,500 – 5,000 sq ft sales with minimal expenditure needed to set up a ‘turnkey’ operation. Flexible lease term with 3 month’s certain and determinable thereafter at short notice. Local Authority Rates Only Payable Basis. High Streets and Shopping Centres considered. Quick decisions made and a swift commitment to a deal once agreed.		
Initial Research Date:	28 May 2012	**Last Update Date:**	18 Mar 2014
Agent:	**Ian Scott International**	**Telephone:**	02074939911
Agent Address:	15 Bolton Street, London, W1J 8BG		
Contact:	**Mike Sheridan** 02072976456 mikesheridan@ianscott.com		

Company Name:	Iceland	**Retailer Type:**	Frozen Foods
Address:	Second Avenue, Deeside Industrial Park, Deeside, Flintshire, CH5 2NW	**Contact:**	
Email:		**Telephone:**	01244 830 100
Requirements size:	6,000 - 8,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Require: 6,000 - 8,000 sqft on one or two floors. High Street, Suburban, Stand alone, Retail Park. Leasehold or Freehold. UK wide. Introductory fees paid.		
Initial Research Date:	07 Jul 2011	**Last Update Date:**	06 Mar 2013
Agent:	**Mason & Partners**	**Telephone:**	02074951971
Agent Address:	Maddox House 1 Maddox Street, London, W1S 1PZ		
Contact:	**Christopher Mason** 020 7495 1971 chrismason@masonpartners.com		
Agent:	**Mason & Partners**	**Telephone:**	01512271008
Agent Address:	Corn Exchange, Brunswick Street, Liverpool, L2 0PJ		
Contact:	**Chris Chetwood** 01512250108 chrischetwood@masonpartners.com		

Company Name:	Confidential C/O Carr & Priddle	**Retailer Type:**	MIscellaneous, Unclassified
Address:	C/O Carr & Priddle, 34 Ship Street, Brighton, BN1 1AD	**Contact:**	
Email:		**Telephone:**	
Requirements size:	450 - 1,000 sq ft	**Use:**	A2
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Retail premises required for retained clients of Carr & Priddle in several cities in England. Retail shops with A2 use or suit; 450 - 1,000 sq ft; local shopping parades; lease - new or assignment; freeholds considered; market rental.		
Last Update Date:	12 Nov 2013		
Agent:	**Carr & Priddle**	**Telephone:**	01273208010
Agent Address:	34 Ship Street, Brighton, BN1 1AD		
Contact:	**Tony Carr** 01273740343 tc@carrpriddle.co.uk		

Company Name:	India Jane Retail Limited	**Retailer Type:**	China & Glass, Department & Variety Stores, Furniture/Carpets, GIFTS, MIscellaneous, Unclassified
Address:	2 Chase Road, Park Royal, London, NW10 6HZ	**Contact:**	Jit Bhasin
Email:	jbhasin@indiajane.co.uk	**Telephone:**	0845 2000 008
Requirements size:	1,500 - 2,500 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Following the success of new store openings in Bath and Farnham, India Jane is actively seeking further retail opportunities. Ground floor retail minimum 1,500 sq ft with overall sales over 2,500 sq ft on two floors. Prefers character buildings and double-fronted displays. Contact A. Donachie.		
Initial Research Date:	29 Jan 2014	**Last Update Date:**	30 Jan 2014
Agent:	**The McDevitt Company**	**Telephone:**	0203 119 2962
Agent Address:	24 West Street, London, WC2H 9NA		
Contact:	**Andrew Donachie** 0203 119 2962 adonachie@mcdevittco.com		

Company Name:	Sprinkles Gelato	**Retailer Type:**	
Requirements size:	1,800 - 2,500 sq ft	**Use:**	A3
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	The most talked about Leisure venue on the South Coast this year.		
Last Update Date:	27 Feb 2014		
Agent:	**Osmond Brookes**	**Telephone:**	02380002020
Agent Address:	PO Box 1766, Southampton, SO18 9JZ		
Contact:	**Jeremy Braybrooke** 02380002020 jeremy.braybrooke@osmondbrookes.co.uk		

Company Name:	FONEWORLD	**Retailer Type:**	Electricals/Phones/Hi-Fi
Address:	Co JP Retail, Linen Hall 162 168 Regent Street, London, W1B 5TG	**Contact:**	
Email:		**Telephone:**	02070390130
Requirements size:	200 - 800 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Gadgets 4 UK Retail, trading as Foneworld, are urgently seeking stores in many towns nationwide. Market rents paid. Short & long term shops required.		
Last Update Date:	04 Nov 2013		
Agent:	**Jp Retail Ltd**	**Telephone:**	02070390130
Agent Address:	Linen Hall, 162-168 Regent Street, London, W1B 5TG		
Contact:	**James Peasnell** 02070390132 james@jpretail.co.uk		

Company Name:	Crepeaffaire	**Retailer Type:**	Fast Food & Take Away
Address:	173 Wardour Street, London, W1F 8WT	**Contact:**	
Email:		**Telephone:**	020 7479 7722
Requirements size:	600 - 1,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Crepeaffaire is looking for new units. A1 use - no outside extraction required. Ideal locations include shopping centres, leisure schemes, high streets and travel interchanges.		
Initial Research Date:	17 May 2013	**Last Update Date:**	03 Jun 2014
Agent:	**Prime Retail Property Consultants LLP**	**Telephone:**	02070165340
Agent Address:	2-3 Conduit Street, London, W1S 2XB		
Contact:	**Jamie Ludlow** 02070165343 jamie.ludlow@primeretailproperty.com	**Joel Berg** 02070165340 joel.berg@primeretailproperty.com	

Company Name:	Surface	**Retailer Type:**	Building Supplies & Services
Requirements size:	2,500 - 4,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Secondary, in Town		
Notes:	Seeking additional retail showrooms In the following locations: RICHMOND UPON THAMES, TUNBRIDGE WELLS, GUILDFORD, ST ALBANS, BEACONSFIELD, WIMBLEDON 2,500 – 4,000 sq ft Design led, character buildings Established 50 years UK & Internationally Trading in Clerkenwell EC1, Eastcastle Street W1, Islington N1 and Battersea SW8		
Last Update Date:	07 May 2014		
Agent:	**Stephen Kane & Company**	**Telephone:**	02072240101
Agent Address:	61 Queen Anne Street, London, W1G 9HH		
Contact:	**Robin Burn** 02072240101 robinburn@stephenkane.co.uk	**Andrew Edgeworth** 02072240101 andrewedgeworth@stephenkane.co.uk	

Company Name:	Myakka Ltd	**Retailer Type:**	Furniture/Carpets, MIscellaneous
Address:	Tything Commercial Centre Station Road, Wincanton, BA9 9EQ	**Contact:**	
Email:		**Telephone:**	08454603122
Requirements size:	3,000 - 5,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Myakka Ltd are looking for leasehold showrooms of 3,000 - 5,000 sq ft on one level with customer parking and good road links. All types of retail format considered - retail warehouse, high street, roadside and trade. Location list is not exhaustive; consideration will be given to surrounding areas.		
Last Update Date:	03 Jun 2014		
Agent:	**Norbury Sansom Ltd**	**Telephone:**	02071834191
Agent Address:	Golden House 30 Bloomsbury Street, London, WC1B 3QJ		
Contact:	**Paul Norbury** paul.norbury@norburylemaistre.com		

Company Name:	Thomas Farthing	**Retailer Type:**	
Requirements size:	500 - 2,500 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Temporary deals required in prime fashion and tourist pitches for high class quality retailers.		
Initial Research Date:	09 Sep 2013	**Last Update Date:**	03 Jun 2014
Agent:	**TK Retail Property Ltd**	**Telephone:**	
Agent Address:	Morley House 320 Regent Street, London, W1B 3BG		
Contact:	**Stephen Kourides** 02073236053 stephen@tkretailproperty.com	**Tim Kourides** 02073236050 tim@tkretailproperty.com	

Company Name:	RunnersNeed	**Retailer Type:**	Footwear, Ladieswear & Accessories, Menswear & Accessories, MIscellaneous, Sports/Outdoor Leisure, Toys, Games & Hobbies, Unclassified, Leisure
Address:	The Rock, 2 Thornberry Way, Slyfield Industrial Estate, Guildford, GU1 1QB	**Contact:**	
Email:		**Telephone:**	08453767669
Requirements size:	1,000 - 1,001 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Founded by runners over 30 years ago, Runners Need is one of the leading specialist running retailers in the UK, with 27 shops nationwide and part of the Snow+Rock group. Requiring retail space at a minimum of 1,000 sq ft plus storage.		
Initial Research Date:	24 Sep 2013	**Last Update Date:**	03 Jun 2014
Agent:	**SPACE Retail Property Consultants**	**Telephone:**	03459003900
Agent Address:	The Winch House, Narborough Wood Park, Desford Road, Enderby, Leicester, LE19 4XT		
Contact:	**Rob Palmer** 03459003902 rob.palmer@space-rpc.com	**Peter Leverett** 03459003901 peter.leverett@space-rpc.com	

Company Name:	Mr Pretzels (UK) Retail Ltd	**Retailer Type:**	Fast Food & Take Away
Address:	11 Blackheath Village, Blackheath, London, SE3 9LA	**Contact:**	
Email:		**Telephone:**	020 8463 0320
Requirements size:	250 - 500 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Mr Pretzels are a truly unique food experience, baking delicious hand-rolled pretzels using only the finest quality natural ingredients, with the pretzel dough prepared on site, to ensure that freshness and taste are guaranteed. Now trading from 12 locations throughout the UK, Mr Pretzels require further sites for immediate occupation. Sites must have high footfall and be 100% prime. 250-500 sq ft shopping centre mall or kiosk units, or high street shops.		
Initial Research Date:	08 May 2012	**Last Update Date:**	03 Jun 2014
Agent:	**SPACE Retail Property Consultants**	**Telephone:**	03459003900
Agent Address:	The Winch House, Narborough Wood Park, Desford Road, Enderby, Leicester, LE19 4XT		
Contact:	**Rob Palmer** 03459003902 rob.palmer@space-rpc.com		

Company Name:	Cycle Surgery	**Retailer Type:**	MIscellaneous, Sports/Outdoor Leisure, Unclassified, Leisure
Address:	2 Thornberry Way, Guildford, GU1 1QB	**Contact:**	
Email:		**Telephone:**	0800 298 8898
Requirements size:	2,500 - 4,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Established as a bicycle workshop in an Islington basement over 20 years ago, Cycle Surgery is now one of the UK's largest Bike Stores and part of the Snow+Rock Group. Cycle Surgery are expanding their portfolio and require further sites with a minimum 2,500 sq ft to 4,000 sq ft trading space in locations across England.		
Initial Research Date:	24 Sep 2013	**Last Update Date:**	03 Jun 2014
Agent:	**SPACE Retail Property Consultants**	**Telephone:**	03459003900
Agent Address:	The Winch House, Narborough Wood Park, Desford Road, Enderby, Leicester, LE19 4XT		
Contact:	**Rob Palmer** 03459003902 rob.palmer@space-rpc.com	**Peter Leverett** 03459003901 peter.leverett@space-rpc.com	

Company Name:	Confidential c/o Hartnell Taylor Cook	**Retailer Type:**	MIscellaneous, Restaurants, Unclassified
Address:	Somerset House, 18 Canynge Road, Bristol, BS8 3JX	**Contact:**	
Email:		**Telephone:**	01179239234
Requirements size:	2,000 - 2,500 sq ft	**Use:**	A3
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Hartnell Taylor Cook are seeking an A3 restaurant space on behalf of a confidential client. 2,000 - 2,500 sq ft, with a minimum ground floor of 1,500 sqft. Close to Cote Brasserie, Carluccio's, Brasserie Blanc, Loch Fyne, etc.		
Last Update Date:	04 Jun 2014		
Agent:	**Hartnell Taylor Cook LLP**	**Telephone:**	02074917323
Agent Address	7-10 Chandos Street, Cavendish Square, London, W1G 9DQ		
Contact:	**Rob Amey** 02077883813 rob.amey@htc.uk.com	**Adam Tyler** 02077883814 adam.tyler@htc.uk.com	

Company Name:	Christy	**Retailer Type:**	Textiles & Soft Furnishings
Address:	Park Square, Bird Hall Lane, Stockport, SK3 0XF	**Contact:**	
Email:		**Telephone:**	0161 367 5800
Requirements size:	2,800 - 3,500 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Following the successful opening of their concept store in Chester in 2012, Christy are now actively seeking additional outlets. A suitable site/location will require the following: - The first cities, towns and centres - Target catchment: ABC1 - Prominent window frontage (min 20ft) - Single level sales floor 1,800 - 2,500 sq ft - Additional storage 1,000 sq ft - Must be accessible for deliveries & collections - Interesting & listed buildings considered Contact Tim Kenney at Kenneymoore.		
Initial Research Date:	13 Feb 2014	**Last Update Date:**	04 Jun 2014
Agent:	**Kenneymoore**	**Telephone:**	01244345600
Agent Address:	5 York Street, Chester, CH1 3LR		
Contact:	**Tim Kenney** 01244345600 tim@kenneymoore.co.uk		

Company Name:	Majestic Wine	**Retailer Type:**	Off Licenses
Address:	Majestic House, Otterpoool Way, Watford, WD25 9WW	**Contact:**	
Email:		**Telephone:**	01923 298 200
Requirements size:	2,000 - 5,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	REQUIRE: Another 15 new sites. Affluent catchment areas. 2000–5000sqft. Dedicated on site car parking. Prominent roadside locations and retail parks. Freehold/Leasehold.		
Last Update Date:	04 Jun 2014		
Agent:	**Rapleys Consultants Ltd**	**Telephone:**	08707776292
Agent Address:	Falcon Road, Hinchingbrook Business Park, Huntingdon, PE29 6FG		
Contact:	**Alisdair James** 01480371418 abj@rapleys.co.uk	**Daniel Cook** 01480 371 457 djc@rapleys.co.uk	

Company Name:	Game Stores Group Ltd	**Retailer Type:**	Toys, Games & Hobbies
Address:	Unity House Telford Road, Basingstoke, RG21 6YJ	**Contact:**	
Email:		**Telephone:**	01256 784 000
Requirements size:	1,000 - 2,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Game are seeking national temporary requirements for immediate occupation from 1,000-2,000 sq ft. Big football driver, shopping centres and high streets, former Game and Gamestation stores a priority. Contact Williams Gunter Hardwick or Lunson Mitchenall.		
Last Update Date:	10 Jun 2014		
Agent:	**Lunson Mitchenall**	**Telephone:**	02074784950
Agent Address:	Charles House 5-11 Regent Street, London, SW1Y 4LR		
Contact:			

Company Name:	Love Coffee	**Retailer Type:**	Fast Food & Take Away, Cafes
Address:	The Roast House Bath Road, Upper Langford, BS40 5DJ	**Contact:**	
Email:		**Telephone:**	01934 853 800
Requirements size:	1,200 - 2,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Love Coffee operates from 30 stores across the UK and are looking for new opportunities for 2014 and beyond. 1,200 - 2,000 sqft External Seating Preferred Shopping Centre and High Street Locations Mainline Rail Stations and Travel Hubs Locations other than those specified will be considered.		
Last Update Date:	21 May 2014		
Agent:	**Harper Dennis Hobbs**	**Telephone:**	02074629100
Agent Address:	Langham House 302-308 Regent Street, London, W1B 3AT		
Contact:	**Daisy Knibb** 02074629118 daisyknibb@hdh.co.uk	**Charlie Catterall** 02074629103 charliecatterall@hdh.co.uk	

Company Name:	Wonderworld	**Retailer Type:**	MIscellaneous, Unclassified
Address:	Xscape, 602 Marlborough Gate, Milton Keynes, MK9 3XS	**Contact:**	
Email:		**Telephone:**	
Requirements size:	10,000 - 25,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	On behalf of No Saints we are seeking new premises, either existing clubs or new units to satisfy their requirement for space in the UK. Units of between 10,000 sq ft to 25,000 sq ft, can be on more than one level. Preferably on a new lease. Location list is not exclusive and other locations throughout the UK will be considered.		
Initial Research Date:	12 Sep 2012	**Last Update Date:**	11 Jun 2014
Agent:	**Bidwells LLP**	**Telephone:**	02074933043
Agent Address:	8 Pollen Street, London, W1S 1NG		
Contact:	**Chris January** 02072976279 chris.january@bidwells.co.uk		

Company Name:	Cancer Research UK	**Retailer Type:**	Charity Shops
Address:	Angel Building, 407 St John Street, London, EC1V 4AD	**Contact:**	
Email:		**Telephone:**	020 7242 0200
Requirements size:	750 - 1,250 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	20 stores required over the next 12 months.		
Initial Research Date:	03 Dec 2012	**Last Update Date:**	14 Jan 2013
Agent:	**Colliers International**	**Telephone:**	02079354499
Agent Address:	50 George Street, London, W1U 7GA		
Contact:	**Steve Burnaby** 02074871712 steve.burnaby@colliers.com		

Company Name:	Caffe Nero	**Retailer Type:**	Cafes
Address:	3 Neal Street, London, WC2H 9KU	**Contact:**	Ben Price
Email:	benp@caffenero.com	**Telephone:**	020 7520 5150
Requirements size:	800 - 2,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Major open A1 and fashion parks.		
Initial Research Date:	25 Mar 2009	**Last Update Date:**	13 Mar 2013
Agent:	**Twenty Retail**	**Telephone:**	02071988888
Agent Address:	11 Bingham Place, London, W1U 5AY		
Contact:	**Richard Wassell** 02071988888 richard.wassell@twentyretail.com		

Company Name:	Haskins Garden Centres	**Retailer Type:**	Hardware & Household Goods, MIscellaneous, Unclassified
Address:	Head Office Building, Longham, Ferndown, BH22 9DJ	**Contact:**	
Email:		**Telephone:**	01202593355
Requirements size:	304,920 - 435,600 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	We are looking to expand our business and build more centres within a 3 hour drive of our Bournemouth Head Office. • 7-10 acre, flat site (brown field preferred). • Retail catchment population in excess of 150,000 people. • Ideally non-green belt with potential for some A1 open floorspace. • Destination location with the opportunity for future retail development. • Visible & easily accessible sites. • Freehold preferred.		
Last Update Date:	23 Jun 2014		
Agent:	**Johnson Fellows LLP**	**Telephone:**	01216439337
Agent Address:	Charter House, 163 Newhall Street, Birmingham, B3 1SW		
Contact:	**Ken Salway** 01212340434 ken.salway@johnsonfellows.co.uk		

Company Name:	A3 Retailer CO Charles Palmer Property Ltd	**Retailer Type:**	Restaurants
Address:	Charles Palmer Property Ltd, 33 Great Portland Street, London, W1W 8QG	**Contact:**	
Email:		**Telephone:**	020 7637 6850
Requirements size:	2,500 - 4,000 sq ft	**Use:**	A3
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	A3 space required in affluent cities / market towns.		
Initial Research Date:	06 Sep 2013	**Last Update Date:**	24 Jun 2014
Agent:	**Charles Palmer Property Ltd**	**Telephone:**	02076376850
Agent Address:	33 Great Portland Street, London, W1W 8QG		
Contact:	**Charles Palmer** 02076376850 cp@charlespalmerproperty.com		

Company Name:	Rituals	**Retailer Type:**	Cosmetics/Beauty/Hair
Address:	c/o 33 Great Portland Street, London, W1W 8QG	**Contact:**	
Email:		**Telephone:**	020 7637 6850
Requirements size:	600 - 1,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Rituals develop high quality products to enrich body and soul: luxury goods ranging from body and facial care, to organic cotton ware, scented candles, perfumes, gemstone make-up and tea. Today Rituals has 175 stores worldwide and are looking to open up further stores across England.		
Initial Research Date:	19 May 2009	**Last Update Date:**	24 Jun 2014
Agent:	**Charles Palmer Property Ltd**	**Telephone:**	02076376850
Agent Address:	33 Great Portland Street, London, W1W 8QG		
Contact:	**Charles Palmer** 02076376850 cp@charlespalmerproperty.com		
Agent:	**Brasier Freeth LLP**	**Telephone:**	01923210810
Agent Address:	Edward Hyde Building, 38 Clarendon Road, Watford, WD17 1HZ		
Contact:	**Mark Poyner** 01923205916 mark.poyner@brasierfreeth.com		

Company Name:	ChangeGroup	**Retailer Type:**	Bank/Financial Services, MIscellaneous, Unclassified
Address:	Meridien House, 42 Upper Berkeley Street, London, W1H 5QJ	**Contact:**	
Email:		**Telephone:**	
Requirements size:	10 - 400 sq ft	**Use:**	A2
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	ChangeGroup are looking for retail units in busy city centre locations with high footfall, preferably in shopping centres Small units and free standing kiosks up to 400 sq ft Scope to install an ATM, although this is not a pre-requisite A2 consent		
Initial Research Date:	15 Jan 2014	**Last Update Date:**	12 Feb 2014
Agent:	**Sanderson Weatherall LLP**	**Telephone:**	02078512100
Agent Address:	Balfour House, 46-54 Great Titchfield Street, London, W1W 7QA		
Contact:	**Paul Moody** 02078512100 paul.moody@sw.co.uk		

Company Name:	Costa	**Retailer Type:**	Fast Food & Take Away, Cafes
Address:	South Central & Midlands	**Contact:**	
Email:		**Telephone:**	
Requirements size:	1,500 - 2,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Brasier Freeth have been appointed to acquire prime new stores in South, Central and Midlands.		
Initial Research Date:	12 Mar 2013	**Last Update Date:**	09 Jul 2014
Agent:	**Brasier Freeth LLP**	**Telephone:**	01923210810
Agent Address:	Edward Hyde Building, 38 Clarendon Road, Watford, WD17 1HZ		
Contact:	**Anthony Appleby** 01923205508 anthony.appleby@brasierfreeth.com	**Mark Segal** 01923205515 mark.segal@brasierfreeth.com	

Company Name:	Blue Cross for Pets	**Retailer Type:**	Charity Shops, MIscellaneous, Unclassified
Address:	The Blue Cross Shilton Road, Burford, OX18 4PF	**Contact:**	
Email:		**Telephone:**	03007771897
Requirements size:	500 - 800 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Secondary, in Town		

Notes: Blue Cross are a registered animal welfare charity, which was established in 1897. The Queen became a patron of the charity in 1997, our centenary year. We currently have 42 trading retail units and require a further 11 units in 2014. In addition to these we have 19 adoption centres and 4 animal hospitals located throughout England.

Blue Cross are currently seeking prime or good secondary locations with a minimum size 500 sq ft sales and 300 sq ft ancillary space. Maximum rent: £35,000 pax.

Location list is not exhaustive and each location will be considered on its own merits

Initial Research Date:	19 Dec 2013	**Last Update Date:**	17 Jul 2014
Agent:	**Johnson Fellows LLP**	**Telephone:**	01216439337
Agent Address:	Charter House, 163 Newhall Street, Birmingham, B3 1SW		
Contact:	**Chris Gaskell** 01212340422 chris.gaskell@johnsonfellows.co.uk	**Oliver Robinson** 01212340459 oliver.robinson@johnsonfellows.co.uk	
Agent:	**Johnson Fellows LLP**	**Telephone:**	01216439337
Agent Address:	Charter House, 163 Newhall Street, Birmingham, B3 1SW		
Contact:	**Stuart Bridgewater** 01212340419 stuart.bridgewater@johnsonfellows.co.uk		

Company Name:	Topps Tiles Plc	**Retailer Type:**	DIY & Home Improvement
Address:	Thorpe Way Grove Park, Enderby, LE19 1SU	**Contact:**	Warren Bester
Email:	wbester@toppstiles.co.uk	**Telephone:**	0116 282 8000
Requirements size:	3,000 - 8,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Topps Tiles continues to expand and requires stores in a number of locations inside the M25.		
Initial Research Date:	19 Jul 2012	**Last Update Date:**	28 Feb 2013

Company Name:	Curzon Cinemas Ltd	**Retailer Type:**	MIscellaneous, Leisure
Address:	20 22 Stukeley Street, London, WC2B 5LR	**Contact:**	
Email:		**Telephone:**	
Requirements size:	6,000 - 15,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Curzon Cinemas seeking further sites: Freehold/Long Leasehold, 6,000 - 15,000 sq ft, High Street/City edge locations, Multiple levels considered, D2/change of use considered.		
Initial Research Date:	05 Jan 2012	**Last Update Date:**	17 Jul 2014
Agent:	**Savills (UK) Limited**	**Telephone:**	01292442999
Agent Address:	33 Margaret Street, London, W1G 0JD		
Contact:	**Carlene Hughes** 02074098177 chughes@savills.com	**David Bell** 02078774516 dbell@savills.com	
Agent:	**Colliers International**	**Telephone:**	02079354499
Agent Address:	50 George Street, London, W1U 7GA		
Contact:	**Ross Kirton** 02074871615 ross.kirton@colliers.com	**Samuel May** 02074871803 samuel.may@colliers.com	

Company Name:	Tragus	**Retailer Type:**	Restaurants
Address:	163 Eversholt Street, London, NW1 1BU	**Contact:**	Naomi Freedman
Email:	Naomi.Freedman@Tragusgroup.com	**Telephone:**	020 7121 3200
Requirements size:	3,000 - 5,000 sq ft	**Use:**	A3
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Tragus is looking for new units for their restaurant chains Café Rouge, Bella Italia and Strada. They are looking for properties in all major cities to use as restaurants in tourist, high street or shopping centre locations.		
Initial Research Date:	10 Aug 2012	**Last Update Date:**	06 Mar 2013

Company Name:	Eclectic Bar Group	**Retailer Type:**	MIscellaneous, Bar/Pub/Club
Address:	533 Kings Road, London, SW10 0TZ	**Contact:**	
Email:		**Telephone:**	02073766300
Requirements size:	2,000 - 8,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Eclectic are one of the UK's leading restaurant, club & bar operators, a focussed acquisitive company looking to acquire an additional 30 sites over the next few years. Ideally between 2,000 and 8,000 sq ft, various layouts will be considered. Late licences required. Use: A3/A4/D2. Market rents will be paid and exisiting business's with the potential to convert will be considered. Please send all suitable London opportunities to Charles Cohen and all suitable national opportunities to David Kornbluth.		
Initial Research Date:	29 Jan 2014	**Last Update Date:**	21 Jul 2014
Agent:	**Cedar Dean Gilmarc**	**Telephone:**	02071005520
Agent Address:	17 Cavendish Square, London, W1G 0PH		
Contact:	**Charles Cohen** 02087310753 charles@cedardeangilmarc.com	**David Kornbluth** 02087310755 davidk@cdgleisure.com	

Company Name:	Brasier Freeth New Client	**Retailer Type:**	
Requirements size:	5,000 - 10,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Roadside, large pubs & restaurants, retail parks or close by and town centres.		
Initial Research Date:	02 Jan 2014	**Last Update Date:**	21 Jul 2014
Agent:	**Brasier Freeth LLP**	**Telephone:**	01923210810
Agent Address:	Edward Hyde Building, 38 Clarendon Road, Watford, WD17 1HZ		
Contact:	**Clive Glenister** 01923 205514 clive.glenister@brasierfreeth.com	**Tim Frost** 01923205512 tim.frost@brasierfreeth.com	

Company Name:	Paul Boulangerie	**Retailer Type:**	Bakers & Confectioners, MIscellaneous, Unclassified
Address:	The Broadgate Tower, 20 Primrose Street, London, EC2A 2RS	**Contact:**	
Email:		**Telephone:**	+44207 4202070
Requirements size:	1,800 - 3,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Paul is seeking Kiosk, Retail, and Retail with café space - • Kiosk: Offering an express take away offering – “grab and go” in a transport hub • Retail: Offering limited eat-in as well as take away service • Retail with café: Offering a full table service trading through into the evening • Prominent units with high footfall • Customer profile to include: shoppers, residents, office workers and tourists • Ease of access to transport links, such as underground stations • Close proximity to other café/takeaway operators • Unit size 1,800 sq ft to 3,000 sq ft • Good servicing and external plant area essential • A1 and A3 use required		
Initial Research Date:	09 Jun 2014	**Last Update Date:**	18 Jun 2014
Agent:	**Savills (UK) Limited**	**Telephone:**	01292442999
Agent Address:	33 Margaret Street, London, W1G 0JD		
Contact:	**Sam Foyle** 02074098171 sfoyle@savills.com	**Peter Flint** 02074998644 pflint@savills.com	

Company Name:	Moshulu	**Retailer Type:**	Childrens & Infants Wear, Footwear
Address:	Heathpark Business Park, Devonshire Road, Honiton, Devon, EX14 1SD	**Contact:**	
Email:		**Telephone:**	01404 540 789
Requirements size:	500 - 1,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Moshulu is looking for new retail stores between 500 - 1,000 sq ft in good high street locations.		
Initial Research Date:	05 Sep 2012	**Last Update Date:**	22 Jul 2014
Agent:	**SPACE Retail Property Consultants**	**Telephone:**	03459003900
Agent Address:	The Winch House, Narborough Wood Park, Desford Road, Enderby, Leicester, LE19 4XT		
Contact:	**Rob Palmer** 03459003902 rob.palmer@space-rpc.com		

Company Name:	The Fragrance Shop	**Retailer Type:**	Cosmetics/Beauty/Hair
Requirements size:	400 - 700 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	The Fragrance Shop are currently seeking to acquire 400 - 700 sq ft of retail space.		
Initial Research Date:	15 May 2013	**Last Update Date:**	22 Jul 2014
Agent:	**Cushman & Wakefield LLP**	**Telephone:**	01618373555
Agent Address:	Zenith Building, 26 Spring Gardens, Manchester, M2 1AB		
Contact:	**Nicola Harrington** 01618373566 nicola.harrington@eur.cushwake.com		

Company Name:	Vodafone	**Retailer Type:**	Electricals/Phones/Hi-Fi
Requirements size:	1,000 - 2,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Vodafone are seeking new stores of up to 2,000 sq ft across the UK. Forward any detail of suitable opportunities to DTZ.		
Initial Research Date:	24 Jun 2014	**Last Update Date:**	24 Jul 2014
Agent:	**DTZ**	**Telephone:**	0113 246 1161
Agent Address:	St Pauls House, 23 Park Square South, Leeds, LS1 2ND		
Contact:	**David Thompson** 0113 233 8830 david.thompson@dtz.com		

Company Name:	Tshirt Store	**Retailer Type:**	Fashion, Ladieswear & Accessories, Menswear & Accessories
Address:	18 Shorts Gardens, London, WC2H 9BE	**Contact:**	
Email:		**Telephone:**	020 8616 8536
Requirements size:	300 - 1,000 sq ft	**Use:**	A1
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Having successfully traded from their first UK store in Covent Garden for over 18 months our client is now seeking further stores. London Target Locations: West End, Kings Road, Kensington High Street, Kingston and Westfield London Outside the M25: Brighton, Cambridge, Guildford and Oxford. This list is not exhaustive and other suitable locations will be considered.		
Initial Research Date:	06 Nov 2012	**Last Update Date:**	24 Jul 2014
Agent:	**Robert Bebington & Co**	**Telephone:**	02074935551
Agent Address:	6 Conduit Street, London, W1S 2XE		
Contact:	**Tom Wyatt** 02074935551 tom@bebington.com		

Company Name:	Joules Clothing Ltd	**Retailer Type:**	Childrens & Infants Wear, Ladieswear & Accessories, Menswear & Accessories
Address:	Apex 14 27-28 Causeway Road, Earlstrees Industrial Estate, Corby, NN17 4DU	**Contact:**	
Email:		**Telephone:**	0845 6066 871
Requirements size:	1,200 - 3,000 sq ft	**Use:**	All
Outlets Required:	Guildford		
Location:	Prime, in Town		
Notes:	Joules clothing is looking to acquire retail units throughout England. They are looking for units between 1,200 – 3,000 sq ft.		
Initial Research Date:	02 Jul 2010	**Last Update Date:**	24 Jul 2014
Agent:	**Robert Bebington & Co**	**Telephone:**	02074935551
Agent Address:	6 Conduit Street, London, W1S 2XE		
Contact:	**Rob Bebington** 02074935551 drb@bebington.com		

APPENDIX 7: PEDESTRIAN COUNTS

Guildford

July 2014

07/07/2014 to 03/08/2014

REGION - South East

Monday to Sunday

COUNT TYPE: Footfall Counts

Monthly Footfall

	Year to Date % Change		Year on Year % Change		Month on Month % Change	
	2014	2013	2014	2013	2014	2013
Guildford	▲ 4.0 %	▼ -5.3 %	▲ 15.5 %	▼ -5.3 %	▲ 2.0 %	▼ -5.9 %
South East	▼ -1.2 %	▼ -0.8 %	▼ -2.7 %	▼ -0.3 %	▲ 3.8 %	▲ 7.6 %
UK	▼ -0.3 %	▼ -0.2 %	▼ -1.6 %	▲ 2.3 %	▲ 2.9 %	▲ 3.2 %

Headlines

Footfall for the year to date is 4% up on the previous year.

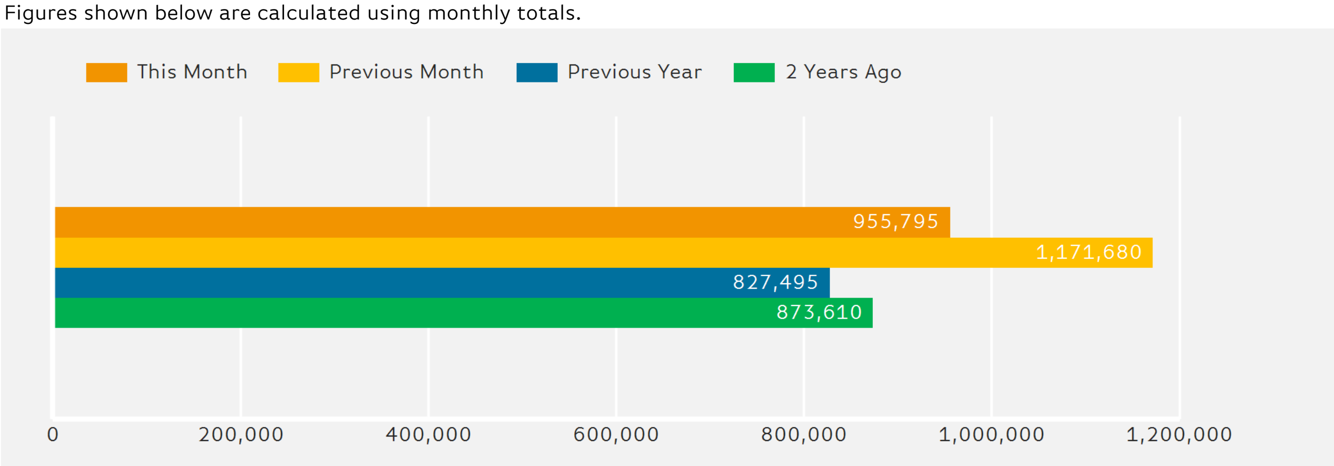
Footfall month commencing 7 July 2014 was 955,795.

The busiest day in month commencing 7 July 2014 was Saturday 12 July with 50,256 visitors.

The peak hour of the month was 14:00 on Saturday with footfall of 6,434

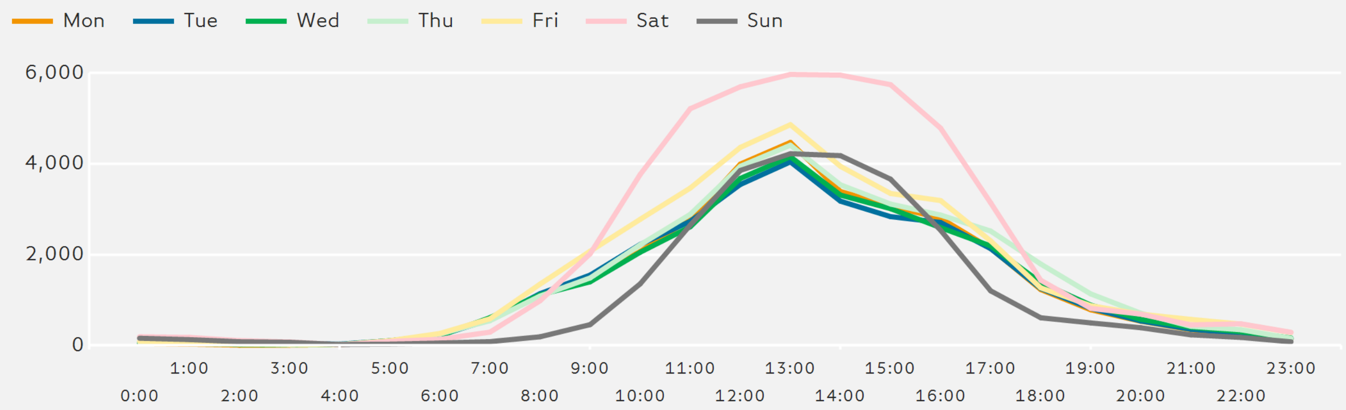
Footfall Totals by Month

Figures shown below are calculated using monthly totals.



Footfall by Hour

The figures shown below are calculated using a weekly average



Weather

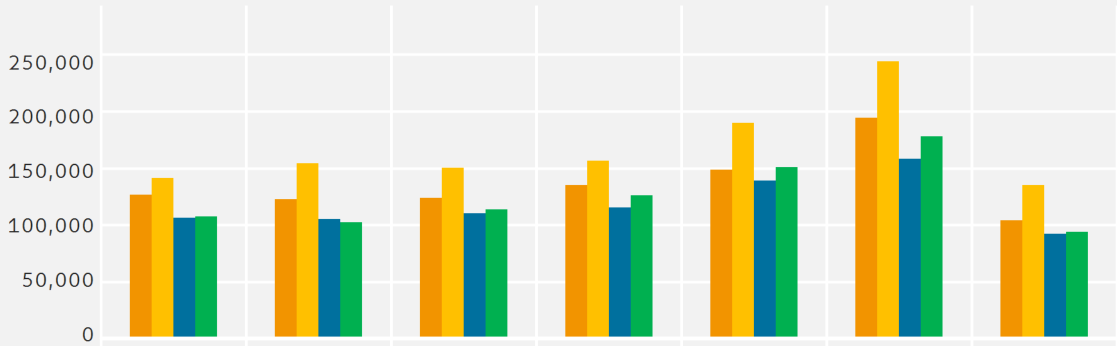
Number of days this month	19	2	7
Number of days same month last year	23	5	

Average Temperature

Average Temperatures	Maximum Temperature	Minimum Temperature
2014	24.6	13.5
2013	26.4	14.3

Footfall by Day

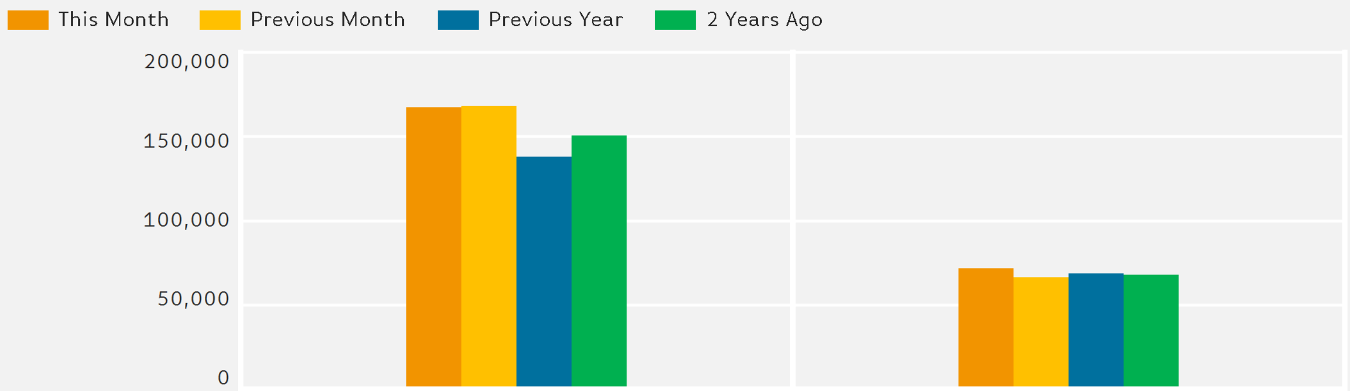
The figures shown below are calculated using monthly totals.



	Mon	Tue	Wed	Thu	Fri	Sat	Sun
This Month	126,837	122,746	123,979	135,037	148,427	194,326	104,443
Previous Month	141,316	154,570	150,486	156,484	189,828	244,088	134,908
Previous Year	106,348	105,499	110,480	115,425	139,118	158,094	92,531
2 Years Ago	107,751	102,724	113,639	126,362	151,215	178,093	93,826
Month on Month % Change	-10.2 %	-20.6 %	-17.6 %	-13.7 %	-21.8 %	-20.4 %	-22.6 %
Year on Year % Change	19.3 %	16.3 %	12.2 %	17.0 %	6.7 %	22.9 %	12.9 %

Footfall Totals

The figures shown below is calculated using weekly averages.



	High Street	North Street
This Month	167,172	71,777
Previous Month	168,012	66,324
Previous Year	138,126	68,748
2 Years Ago	150,502	67,901
Year on Year % Change	21.0 %	4.4 %

Year to Date % Change is the annual % change in footfall from January of this year compared to the same period last year.
Year on Year % Change is the % change in footfall for this week compared to the same week in the previous year.
Week on Week % Change is the % change in footfall for this week from the previous week.

APPENDIX 8: CONVENIENCE GOODS MARKET SHARE ANALYSIS

TABLE 1: ALL FOOD SHOPPING - MARKET SHARE ANALYSIS (%)

	ZONES	ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
Guildford Borough	M&S Simply Food, Guildford Station	0.0%	1.1%	0.5%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.8%
	Marks & Spencer, 61-65 High Street	7.4%	0.7%	1.5%	0.6%	0.1%	0.1%	0.0%	0.0%	0.0%	0.5%	0.5%	2.2%
	Morrisons Local, 193 High St	0.7%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.2%	0.4%
	Sainsbury's, 148-150 High Street	16.6%	3.8%	3.7%	0.2%	1.2%	0.0%	0.6%	0.0%	0.0%	0.4%	1.4%	6.3%
	Tesco Express, 7-11 Bridge Street	3.4%	1.3%	0.0%	0.6%	0.0%	0.0%	0.0%	1.3%	0.0%	0.7%	0.4%	1.5%
	Sub Total: Guildford City Centre	**28.1%**	**6.9%**	**7.0%**	**1.8%**	**1.3%**	**0.1%**	**0.6%**	**1.4%**	**0.5%**	**2.0%**	**2.6%**	**11.0%**
	Ash District Centre	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.3%	0.4%
	East Horsley District Centre	0.0%	4.1%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.5%
	All other local shops in Borough	15.3%	12.2%	9.7%	0.0%	1.6%	0.2%	0.4%	2.0%	5.5%	0.5%	3.6%	12.4%
	Sainsbury's, Clay Lane	24.6%	13.3%	5.2%	1.2%	2.4%	0.0%	0.1%	0.7%	0.0%	2.0%	3.1%	14.0%
	Tesco, Ashenden Road	12.6%	27.4%	7.5%	1.4%	2.7%	0.0%	0.9%	0.0%	0.0%	0.9%	4.3%	20.9%
	Sub-Total: Guildford Borough	**80.5%**	**64.4%**	**29.3%**	**4.4%**	**8.2%**	**0.3%**	**1.9%**	**4.1%**	**7.4%**	**5.5%**	**14.4%**	**61.2%**
Rest of Study Area	Addlestone	0.0%	0.0%	0.6%	0.0%	0.1%	20.0%	0.0%	0.0%	0.4%	0.0%	3.8%	0.1%
	Aldershot	0.0%	2.6%	0.0%	0.5%	1.0%	0.0%	0.5%	0.1%	40.1%	0.0%	7.1%	1.6%
	Cobham	0.0%	12.9%	0.6%	0.0%	4.6%	1.7%	9.6%	0.3%	0.0%	0.0%	3.6%	8.1%
	Farnham	2.5%	3.3%	1.7%	0.5%	0.4%	0.1%	0.6%	0.0%	34.4%	2.6%	6.4%	2.9%
	Godalming	12.2%	2.0%	44.5%	24.1%	0.3%	0.2%	0.0%	0.0%	6.5%	85.6%	8.3%	11.7%
	Horsham	0.0%	0.2%	0.6%	1.2%	0.0%	0.1%	5.5%	87.2%	0.0%	0.0%	6.9%	0.2%
	Woking	3.8%	3.2%	2.4%	0.5%	74.5%	6.6%	1.4%	0.0%	0.8%	0.7%	14.7%	3.2%
	All other	0.0%	4.9%	19.6%	64.3%	8.6%	55.5%	73.3%	6.6%	0.6%	2.1%	27.5%	6.6%
	Sub Total: Rest of Study Area	**18.5%**	**29.1%**	**70.0%**	**91.0%**	**89.5%**	**84.3%**	**90.9%**	**94.2%**	**82.7%**	**91.0%**	**78.5%**	**34.5%**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	1.0%	6.4%	0.7%	4.5%	2.3%	15.4%	7.2%	1.7%	9.9%	3.5%	7.1%	4.3%
	Sub Total: Outside Study Area	**1.0%**	**6.4%**	**0.7%**	**4.5%**	**2.3%**	**15.4%**	**7.2%**	**1.7%**	**9.9%**	**3.5%**	**7.1%**	4.3%
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: TOP-UP FOOD SHOPPING - MARKET SHARE ANALYSIS (%)

	ZONES	ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
Guildford Borough	M&S Simply Food, Guildford Station	0.0%	1.6%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.4%
	Marks & Spencer, 61-65 High Street	12.2%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	3.4%
	Morrisons Local, 193 High St	2.1%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%
	Sainsbury's, 148-150 High Street	21.4%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	1.0%	5.2%
	Tesco Express, 7-11 Bridge Street	2.9%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	5.1%	0.0%	1.8%	0.7%	0.6%
	Sub Total: Guildford City Centre	**38.6%**	**4.8%**	**4.2%**	**2.3%**	**0.0%**	**0.0%**	**0.0%**	**5.1%**	**0.0%**	**3.5%**	**2.6%**	**11.3%**
	Ash District Centre	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	0.0%	1.1%	1.2%
	East Horsley District Centre	0.0%	16.2%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	10.1%
	All other local shops in Borough	46.9%	40.8%	36.6%	0.0%	4.8%	0.0%	1.0%	4.7%	21.3%	1.5%	11.9%	41.2%
	Sainsbury's, Clay Lane	1.4%	9.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	6.2%
	Tesco, Ashenden Road	4.1%	2.3%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.6%	2.2%
	Sub-Total: Guildford Borough	**91.0%**	**75.0%**	**42.7%**	**4.5%**	**5.9%**	**0.0%**	**1.0%**	**9.8%**	**26.8%**	**6.6%**	**19.4%**	**72.3%**
Rest of Study Area	Addlestone	0.0%	0.0%	0.0%	0.0%	0.0%	15.1%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%
	Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	31.2%	0.0%	5.1%	0.0%
	Cobham	0.0%	0.0%	0.0%	0.0%	3.3%	1.1%	2.2%	1.1%	0.0%	0.0%	1.1%	0.0%
	Farnham	1.7%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.1%	3.3%	4.6%	2.3%
	Godalming	2.1%	0.0%	19.0%	21.4%	0.0%	0.9%	0.0%	0.0%	0.0%	74.4%	5.4%	3.8%
	Horsham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	72.4%	0.0%	0.0%	5.5%	0.0%
	Woking	1.4%	0.0%	2.2%	0.0%	69.3%	4.1%	1.0%	0.0%	0.0%	1.5%	12.7%	0.7%
	All other	0.0%	5.1%	36.1%	72.9%	16.3%	71.7%	85.5%	15.6%	1.9%	3.3%	35.4%	9.7%
	Sub Total: Rest of Study Area	**5.2%**	**8.3%**	**57.3%**	**94.4%**	**88.9%**	**92.7%**	**92.7%**	**89.1%**	**58.2%**	**82.5%**	**72.7%**	**16.6%**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	3.8%	16.7%	0.0%	1.2%	5.2%	7.3%	6.3%	1.1%	15.0%	11.0%	7.9%	11.1%
	Sub Total: Outside Study Area	**3.8%**	**16.7%**	**0.0%**	**1.2%**	**5.2%**	**7.3%**	**6.3%**	**1.1%**	**15.0%**	**11.0%**	**7.9%**	**11.1%**
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 3: MAIN FOOD (PRIMARY) SHOPPING - MARKET SHARE ANALYSIS (%)

	ZONES	ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
Guildford Borough	M&S Simply Food, Guildford Station	0.0%	0.8%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.5%
	Marks & Spencer, 61-65 High Street	4.2%	0.0%	1.2%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.3%	1.0%
	Morrisons Local, 193 High St	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.1%	0.2%
	Sainsbury's, 148-150 High Street	13.1%	3.6%	3.2%	0.0%	1.8%	0.0%	0.8%	0.0%	0.0%	0.0%	1.3%	5.4%
	Tesco Express, 7-11 Bridge Street	3.9%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	1.8%
	Sub-total - Guildford City Centre	**21.2%**	**6.1%**	**5.3%**	**1.4%**	**1.8%**	**0.0%**	**0.8%**	**0.0%**	**0.6%**	**0.7%**	**2.2%**	**8.9%**
	Ash District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	East Horsley District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Local Stores in Borough	3.9%	1.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%	0.0%	0.4%	1.4%
	Sainsbury's, Clay Lane	35.3%	15.5%	6.7%	1.9%	3.3%	0.0%	0.0%	0.9%	0.0%	3.1%	4.0%	17.8%
	Tesco, Ashenden Road	15.8%	39.3%	10.9%	0.8%	3.9%	0.0%	1.3%	0.0%	0.0%	0.0%	6.0%	29.5%
	Sub-Total: Guildford Borough	**76.2%**	**61.9%**	**22.9%**	**4.1%**	**9.5%**	**0.0%**	**2.1%**	**1.5%**	**0.6%**	**3.9%**	**12.5%**	**57.6%**
Rest of Study Area	Addlestone	0.0%	0.0%	0.8%	0.0%	0.0%	24.3%	0.0%	0.0%	0.7%	0.0%	4.7%	0.2%
	Aldershot	0.0%	3.7%	0.0%	0.8%	0.0%	0.0%	0.8%	0.0%	44.5%	0.0%	7.8%	2.3%
	Cobham	0.0%	16.2%	1.0%	0.0%	5.4%	2.1%	11.6%	0.0%	0.0%	0.0%	4.4%	10.2%
	Farnham	2.5%	3.6%	1.7%	0.7%	0.6%	0.0%	0.8%	0.0%	37.5%	2.6%	7.0%	3.1%
	Godalming	16.3%	2.4%	56.2%	25.4%	0.5%	0.0%	0.0%	0.0%	9.6%	90.7%	9.7%	14.9%
	Horsham	0.0%	0.0%	0.8%	1.2%	0.0%	0.0%	6.2%	92.6%	0.0%	0.0%	7.3%	0.2%
	Woking	5.0%	4.9%	1.8%	0.8%	79.9%	7.3%	1.6%	0.0%	0.7%	0.0%	16.0%	4.4%
	All other	0.0%	4.4%	13.9%	61.8%	2.9%	47.6%	68.7%	4.1%	0.0%	2.0%	23.9%	5.3%
	Sub Total: Rest of Study Area	**23.8%**	**35.2%**	**76.3%**	**90.7%**	**89.2%**	**81.3%**	**89.7%**	**96.7%**	**92.9%**	**95.3%**	80.8%	**40.4%**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	0.0%	3.0%	0.8%	5.2%	1.3%	18.7%	8.2%	1.8%	6.5%	0.9%	6.7%	2.0%
	Sub Total: Outside Study Area	**0.0%**	**3.0%**	**0.8%**	**5.2%**	**1.3%**	**18.7%**	**8.2%**	**1.8%**	**6.5%**	**0.9%**	**6.7%**	**2.0%**
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 4: MAIN FOOD (SECONDARY) SHOPPING - MARKET SHARE ANALYSIS (%)

	ZONES	ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
Guildford Borough	M&S Simply Food, Guildford Station	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.3%	1.0%
	Marks & Spencer, 61-65 High Street	16.2%	3.3%	6.9%	0.9%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.6%	6.5%
	Morrisons Local, 193 High St	1.6%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	3.7%	0.4%	0.6%
	Sainsbury's, 148-150 High Street	27.5%	10.1%	16.1%	2.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	2.8%	14.6%
	Tesco Express, 7-11 Bridge Street	1.4%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.3%	1.3%
	Sub Total Guilford City Centre	**46.8%**	**16.7%**	**24.8%**	**2.9%**	**1.0%**	**1.0%**	**1.1%**	**1.5%**	**1.1%**	**6.7%**	**5.4%**	**24.1%**
	Ash District Centre	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.0%
	East Horsley District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Local shops, Guildford Borough	10.2%	13.8%	6.0%	0.0%	0.0%	2.4%	0.9%	3.9%	2.3%	1.2%	3.3%	11.6%
	Sainsbury's, Clay Lane	12.2%	9.7%	3.3%	0.0%	2.3%	0.0%	0.9%	1.2%	0.0%	0.0%	2.1%	9.1%
	Tesco, Ashenden Road	13.1%	12.9%	3.6%	3.5%	1.9%	0.0%	0.0%	0.0%	0.0%	5.5%	2.8%	11.3%
	Sub-Total: Guildford Borough	**82.3%**	**54.8%**	**37.6%**	**6.4%**	**5.2%**	**3.4%**	**3.0%**	**6.6%**	**3.3%**	**13.4%**	13.8%	57.1%
Rest of Study Area	Addlestone	0.0%	0.0%	0.0%	0.0%	1.0%	4.3%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%
	Aldershot	0.0%	2.4%	0.0%	0.0%	9.5%	0.0%	0.0%	1.2%	33.7%	0.0%	7.5%	1.5%
	Cobham	0.0%	23.8%	0.0%	0.0%	2.9%	1.0%	14.7%	0.0%	0.0%	0.0%	5.0%	14.8%
	Farnham	4.8%	1.7%	6.2%	0.0%	0.8%	1.0%	0.9%	0.0%	37.1%	1.2%	7.1%	3.1%
	Godalming	11.5%	4.3%	32.2%	22.0%	0.0%	0.0%	0.0%	0.0%	2.6%	80.1%	7.1%	10.8%
	Horsham	0.0%	1.9%	0.0%	4.3%	0.0%	1.0%	4.8%	89.2%	0.0%	0.0%	7.6%	1.2%
	Woking	1.4%	0.0%	6.7%	0.0%	52.5%	9.1%	1.3%	0.0%	3.2%	3.5%	11.6%	1.5%
	All other	0.0%	7.9%	15.8%	58.3%	26.3%	66.0%	72.2%	0.0%	1.1%	0.0%	31.6%	7.8%
	Sub Total: Rest of Study Area	**17.7%**	**41.9%**	**60.8%**	**84.6%**	**93.0%**	**82.5%**	**94.1%**	**90.4%**	**77.7%**	**84.8%**	78.4%	40.6%
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	0.0%	3.3%	1.5%	9.0%	1.9%	14.0%	3.0%	3.0%	19.0%	1.9%	7.8%	2.3%
	Sub Total: Outside Study Area	**0.0%**	**3.3%**	**1.5%**	**9.0%**	**1.9%**	**14.0%**	**3.0%**	**3.0%**	**19.0%**	**1.9%**	7.8%	2.3%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

APPENDIX 9: COMPARISON GOODS MARKET SHARE ANALYSIS

Carter Jonas

TABLE 1: ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£68.5	£241.1	£71.5	£185.9	£366.4	£418.7	£257.9	£152.9	£347.2	£77.1	£2,187.2	£381.1
Guildford Borough	Guildford Town Centre	75.8%	71.8%	46.4%	38.9%	25.3%	8.2%	26.6%	4.7%	18.9%	46.2%	29.0%	67.8%
	Ladymead Retail Park	9.3%	10.5%	13.8%	6.5%	3.6%	1.6%	1.8%	0.9%	2.5%	5.4%	4.2%	10.9%
	Sainsbury's Clay Lane	0.6%	0.5%	0.1%	0.1%	0.0%	0.1%	0.2%	0.1%	0.0%	0.0%	0.1%	0.5%
	Tesco, Ashenden Road	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	1.8%	0.5%	0.3%	2.3%	0.4%	0.3%	0.4%	0.0%	0.7%	0.8%	0.6%	0.7%
	Other Guildford Borough	0.3%	1.9%	0.5%	0.0%	0.3%	0.5%	0.1%	0.0%	1.9%	0.1%	0.7%	1.3%
	Sub-total Guildford Borough	88.0%	85.2%	61.1%	47.7%	29.5%	10.6%	29.2%	5.6%	23.9%	52.5%	34.7%	81.2%
Rest of Study Area	Aldershot	1.5%	1.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	28.3%	0.1%	4.7%	1.0%
	Godalming	1.8%	0.7%	16.1%	9.7%	0.0%	0.0%	0.0%	0.0%	0.4%	37.7%	2.9%	3.8%
	Horsham	0.0%	0.7%	1.2%	2.0%	0.3%	0.0%	7.3%	79.6%	0.0%	0.4%	6.8%	0.7%
	Woking	5.1%	4.3%	1.9%	0.9%	48.2%	30.1%	0.7%	0.1%	1.4%	0.4%	14.9%	4.0%
	All other in Study Area	1.0%	3.4%	9.1%	25.9%	6.9%	23.8%	30.5%	0.3%	17.8%	4.2%	15.2%	4.1%
Outside Study Area	Camberley	0.0%	0.4%	1.9%	0.6%	3.9%	2.2%	0.2%	0.0%	4.4%	0.2%	2.0%	0.6%
	Farnborough	0.0%	0.2%	0.1%	0.5%	4.0%	2.3%	0.0%	0.2%	16.4%	0.3%	3.8%	0.1%
	Kingston upon Thames	1.2%	1.9%	4.8%	1.8%	3.5%	6.8%	19.1%	0.1%	3.4%	1.9%	5.3%	2.3%
	All other outside Study Area	1.4%	2.1%	3.9%	10.6%	3.8%	24.2%	13.0%	14.1%	4.1%	2.3%	9.8%	2.3%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: CLOTHING AND FOOTWEAR - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£18.2	£60.7	£17.2	£44.8	£92.4	£103.6	£63.7	£37.4	£87.1	£19.3	£544.3	£96.1
Guildford Borough	Guildford Town Centre	86.8%	88.4%	77.1%	67.7%	36.5%	12.6%	42.9%	8.4%	30.1%	87.9%	42.9%	86.1%
	Ladymead Retail Park	1.8%	0.0%	0.9%	0.9%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.3%	0.5%
	Sainsbury's Clay Lane	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbrodge Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Guildford Borough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-total Guildford Borough	**89.9%**	**88.4%**	**78.0%**	**68.6%**	**36.5%**	**12.6%**	**42.9%**	**8.4%**	**31.0%**	**87.9%**	**43.3%**	**86.8%**
Rest of Study Area	Aldershot	2.3%	1.8%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	26.2%	0.0%	4.5%	1.6%
	Godalming	0.9%	0.0%	8.9%	1.8%	0.0%	0.0%	0.0%	0.0%	1.7%	9.2%	1.1%	1.8%
	Horsham	0.0%	0.0%	0.9%	3.5%	0.0%	0.0%	8.6%	76.7%	0.0%	0.0%	6.6%	0.2%
	Woking	3.4%	3.6%	0.9%	0.0%	39.7%	49.6%	0.0%	0.0%	0.7%	1.0%	16.9%	3.1%
	All other in Study Area	1.3%	0.9%	1.9%	11.3%	4.1%	7.8%	21.5%	0.0%	12.0%	0.0%	7.7%	1.1%
Outside Study Area	Camberley	0.0%	1.6%	3.0%	1.2%	6.9%	4.4%	0.0%	0.0%	10.8%	0.0%	4.1%	1.5%
	Farnborough	0.0%	0.0%	0.0%	2.2%	0.6%	0.0%	0.0%	0.0%	11.0%	0.0%	2.0%	0.0%
	Kingston upon Thames	0.0%	1.5%	2.5%	1.2%	3.4%	7.2%	8.9%	0.0%	0.0%	0.0%	3.3%	1.4%
	All other outside Study Area	2.2%	2.2%	3.9%	9.4%	8.8%	18.4%	18.0%	14.9%	6.5%	1.9%	10.5%	2.5%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 3: RECORDED MEDIA - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£1.3	£5.5	£1.6	£4.2	£8.4	£9.7	£5.8	£3.8	£8.3	£1.8	£50.5	£8.4
Guildford Borough	Guildford Town Centre	85.0%	82.5%	73.8%	55.7%	37.6%	5.5%	52.8%	0.0%	49.2%	55.4%	41.7%	81.3%
	Ladymead Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.1%	0.0%
	Sainsbury's Clay Lane	4.2%	0.0%	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.6%
	Tesco, Ashenden Road	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.7%
	Woodbrodge Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other Guildford Borough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sub-total Guildford Borough	**94.0%**	**82.5%**	**73.8%**	**59.7%**	**37.6%**	**5.5%**	**52.8%**	**0.0%**	**49.2%**	**58.6%**	**42.4%**	**82.7%**
Rest of Study Area	Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	25.8%	0.0%	4.2%	0.0%
	Godalming	0.0%	4.2%	12.2%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	38.2%	2.5%	5.1%
	Horsham	0.0%	0.0%	0.0%	12.9%	0.0%	0.0%	20.6%	98.3%	0.0%	0.0%	10.8%	0.0%
	Woking	0.0%	0.0%	0.0%	0.0%	56.2%	9.0%	0.0%	0.0%	0.0%	0.0%	11.1%	0.0%
	All other in Study Area	0.0%	4.2%	8.2%	24.1%	0.0%	57.1%	17.4%	0.0%	19.5%	3.2%	19.0%	4.3%
Outside Study Area	Camberley	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	2.8%	0.0%	1.1%	0.0%
	Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
	Kingston upon Thames	0.0%	0.0%	0.0%	0.0%	6.2%	12.5%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
	All other outside Study Area	6.0%	9.1%	5.8%	0.0%	0.0%	9.6%	9.2%	1.7%	2.8%	0.0%	4.8%	8.0%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 4: AUDIO VISUAL - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£6.7	£23.2	£7.2	£18.4	£36.0	£41.1	£25.8	£15.0	£33.3	£7.0	£213.6	£37.1
Guildford Borough	Guildford Town Centre	37.5%	44.3%	15.8%	36.3%	6.5%	5.4%	27.9%	0.0%	16.7%	53.8%	19.5%	37.5%
	Ladymead Retail Park	27.5%	41.2%	53.8%	25.3%	13.2%	1.4%	3.6%	1.3%	7.2%	22.6%	14.2%	41.2%
	Sainsbury's Clay Lane	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.3%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	14.1%	3.9%	1.5%	11.5%	1.3%	1.4%	1.2%	0.0%	5.8%	6.1%	3.7%	5.3%
	Other GBC	3.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.3%
	Sub-total Guildford Borough	**84.0%**	**90.5%**	**71.1%**	**73.1%**	**21.1%**	**8.2%**	**32.7%**	**1.3%**	**29.7%**	**82.5%**	**37.7%**	**85.6%**
Rest of Study Area	Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	0.0%	1.4%	0.0%
	Godalming	0.0%	0.0%	3.6%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.4%	0.7%
	Horsham	0.0%	4.0%	1.5%	0.0%	0.0%	0.0%	6.5%	68.4%	0.0%	0.0%	6.1%	2.8%
	Woking	11.1%	0.0%	0.0%	2.8%	61.4%	14.8%	0.0%	0.0%	0.0%	0.0%	13.8%	2.0%
	All other in Study Area	0.0%	2.8%	9.7%	3.2%	9.9%	48.9%	13.6%	0.0%	15.2%	6.3%	16.2%	3.7%
Outside Study Area	Camberley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	3.0%	0.0%	0.6%	0.0%
	Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	40.2%	0.0%	7.4%	0.0%
	Kingston upon Thames	3.3%	2.7%	10.4%	11.9%	6.2%	10.1%	29.4%	0.0%	0.0%	5.9%	8.5%	4.3%
	All other outside Study Area	1.6%	0.0%	3.7%	7.7%	1.3%	12.3%	16.4%	30.3%	2.7%	1.3%	8.0%	1.0%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 5: DOMESTIC APPLIANCES - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£2.0	£9.4	£3.1	£8.1	£14.6	£16.9	£10.9	£6.0	£14.0	£3.4	£88.4	£14.5
Guildford Borough	Guildford Town Centre	38.9%	41.2%	17.1%	33.0%	5.5%	7.1%	9.8%	0.0%	5.4%	22.4%	14.1%	35.8%
	Ladymead Retail Park	38.7%	33.0%	59.3%	22.4%	11.4%	5.7%	3.6%	12.1%	17.8%	19.4%	16.3%	39.4%
	Sainsbury's Clay Lane	0.0%	0.0%	1.2%	0.0%	0.0%	1.3%	0.0%	1.0%	0.0%	0.0%	0.4%	0.2%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	12.7%	1.9%	1.2%	18.2%	2.8%	4.1%	3.2%	0.0%	2.4%	5.4%	4.4%	3.3%
	Other GBC	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.4%
	Sub-total Guildford Borough	**90.4%**	**78.3%**	**78.8%**	**73.5%**	**19.7%**	**18.1%**	**16.6%**	**13.1%**	**25.7%**	**47.2%**	**35.4%**	**80.1%**
Rest of Study Area	Aldershot	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.4%	0.0%	1.7%	0.6%
	Godalming	0.0%	0.0%	7.2%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	28.3%	1.8%	1.5%
	Horsham	0.0%	0.9%	2.5%	3.2%	0.0%	0.0%	5.1%	60.2%	0.0%	0.0%	5.2%	1.1%
	Woking	4.2%	12.8%	0.0%	0.0%	53.2%	10.8%	0.0%	0.0%	3.3%	2.1%	12.9%	8.9%
	All other in Study Area	3.0%	3.0%	5.8%	16.1%	20.9%	55.0%	32.1%	1.0%	14.7%	14.1%	22.9%	3.6%
Outside Study Area	Camberley	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.9%	0.0%	2.4%	0.0%	1.0%	0.0%
	Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	42.6%	0.0%	7.3%	0.0%
	Kingston upon Thames	1.2%	2.2%	2.8%	2.5%	6.3%	6.2%	26.6%	0.0%	0.0%	6.0%	6.3%	2.2%
	All other outside Study Area	1.2%	1.9%	2.8%	0.0%	0.0%	4.6%	18.7%	25.6%	0.9%	2.3%	5.5%	2.0%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 6: BOOKS, STATIONARY, ETC. - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£3.1	£10.5	£3.3	£8.4	£15.7	£18.0	£11.4	£6.5	£14.4	£3.4	£94.7	£16.8
Guildford Borough	Guildford Town Centre	91.7%	85.8%	57.1%	26.7%	14.4%	5.8%	15.3%	0.0%	9.8%	18.0%	24.3%	81.2%
	Ladymead Retail Park	2.5%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%
	Sainsbury's Clay Lane	1.3%	0.0%	1.3%	0.0%	1.1%	0.0%	0.0%	1.1%	0.0%	0.0%	0.3%	0.5%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other GBC	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
	Sub-total Guildford Borough	**95.5%**	**85.8%**	**60.0%**	**26.7%**	**15.5%**	**5.8%**	**15.3%**	**1.1%**	**9.8%**	**19.2%**	**24.8%**	**82.5%**
Rest of Study Area	Aldershot	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	52.1%	0.0%	8.2%	1.5%
	Godalming	1.3%	0.0%	28.1%	25.6%	0.0%	0.0%	0.0%	0.0%	0.0%	78.2%	6.1%	5.7%
	Horsham	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	7.7%	92.3%	0.0%	0.0%	7.4%	0.0%
	Woking	1.5%	4.6%	0.0%	0.0%	64.6%	40.6%	0.0%	0.0%	1.8%	1.2%	19.3%	3.1%
	All other in Study Area	0.0%	4.4%	9.7%	46.1%	3.5%	32.7%	49.8%	2.4%	32.3%	0.0%	22.8%	4.6%
Outside Study Area	Camberley	0.0%	0.0%	0.0%	0.0%	15.1%	7.6%	0.0%	0.0%	0.0%	0.0%	3.9%	0.0%
	Farnborough	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	1.4%	0.7%	0.2%
	Kingston upon Thames	0.0%	0.0%	1.1%	0.0%	0.0%	4.2%	14.4%	0.0%	0.0%	0.0%	2.6%	0.2%
	All other outside Study Area	1.8%	2.9%	0.0%	0.0%	1.3%	9.1%	12.7%	4.3%	0.0%	0.0%	4.1%	2.1%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 7: PETS, SPORTS, HOBBIES, ETC. - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£10.8	£34.8	£10.5	£27.4	£53.0	£61.3	£37.6	£22.9	£51.7	£11.1	£321.0	£56.0
Guildford Borough	Guildford Town Centre	74.6%	77.0%	25.1%	26.6%	15.6%	4.1%	28.4%	1.1%	14.1%	23.9%	23.8%	66.8%
	Ladymead Retail Park	4.3%	0.0%	0.0%	0.0%	0.9%	3.3%	0.0%	0.0%	0.0%	1.5%	1.0%	0.8%
	Sainsbury's Clay Lane	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other GBC	0.0%	2.2%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.6%	1.4%
	Sub-total Guildford Borough	**78.9%**	**79.2%**	**25.1%**	**26.6%**	**16.5%**	**9.2%**	**28.4%**	**1.1%**	**14.1%**	**25.3%**	**25.3%**	**69.0%**
Rest of Study Area	Aldershot	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	35.1%	0.0%	5.8%	1.0%
	Godalming	7.4%	3.1%	36.2%	20.5%	0.0%	0.0%	0.0%	0.0%	0.0%	71.7%	6.0%	10.1%
	Horsham	0.0%	0.0%	2.0%	1.4%	0.0%	0.0%	4.7%	86.7%	0.0%	0.0%	6.9%	0.4%
	Woking	12.0%	10.2%	8.5%	3.1%	68.9%	30.3%	4.6%	0.0%	4.4%	0.0%	20.5%	10.2%
	All other in Study Area	1.7%	6.0%	19.8%	44.1%	4.1%	38.6%	31.8%	1.1%	27.4%	1.5%	21.4%	7.7%
Outside Study Area	Camberley	0.0%	0.0%	6.4%	0.0%	10.5%	3.0%	0.0%	0.0%	6.8%	0.0%	3.6%	1.2%
	Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	10.8%	0.0%	1.8%	0.0%
	Kingston upon Thames	0.0%	0.0%	2.0%	0.0%	0.0%	4.5%	23.6%	0.0%	0.0%	0.0%	3.7%	0.4%
	All other outside Study Area	0.0%	0.0%	0.0%	4.2%	0.0%	14.3%	6.9%	10.1%	1.4%	1.5%	4.9%	0.0%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 8: LUXURY GOODS, PERSONAL ITEMS (INCL COSMETICS, MEDICINE, ETC.) - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£16.4	£56.3	£16.1	£42.4	£85.1	£96.8	£58.8	£35.0	£79.7	£17.8	£504.4	£88.8
Guildford Borough	Guildford Town Centre	93.4%	82.9%	56.9%	31.2%	38.7%	9.0%	21.5%	7.7%	20.9%	30.9%	32.4%	80.1%
	Ladymead Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Sainsbury's Clay Lane	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.4%	1.5%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Other GBC	0.0%	3.3%	1.8%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.4%
	Sub-total Guildford Borough	**93.4%**	**88.5%**	**58.7%**	**31.2%**	**39.3%**	**9.0%**	**22.4%**	**7.7%**	**20.9%**	**30.9%**	**33.3%**	**84.0%**
Rest of Study Area	Aldershot	1.9%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.0%	0.0%	6.5%	0.9%
	Godalming	0.0%	0.0%	17.2%	12.0%	0.0%	0.0%	0.0%	0.0%	0.0%	59.5%	3.7%	3.1%
	Horsham	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	6.8%	80.8%	0.0%	0.0%	6.5%	0.0%
	Woking	3.4%	2.5%	1.3%	0.0%	44.8%	35.9%	0.0%	0.0%	1.0%	0.0%	15.0%	2.5%
	All other in Study Area	0.0%	4.0%	9.3%	36.6%	9.9%	16.7%	40.0%	0.0%	16.7%	5.5%	16.2%	4.2%
Outside Study Area	Camberley	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
	Farnborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	3.2%	0.0%	0.7%	0.0%
	Kingston upon Thames	1.3%	2.3%	7.0%	0.9%	2.3%	9.4%	22.8%	0.0%	14.6%	1.0%	7.8%	2.9%
	All other outside Study Area	0.0%	1.8%	6.6%	17.0%	3.6%	28.2%	8.0%	11.5%	3.5%	3.1%	10.3%	2.3%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 9: FURNITURE, FLOORINGS, HOMEWARE, ETC. - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£7.2	£28.4	£8.2	£21.6	£42.7	£49.4	£29.8	£18.4	£41.0	£9.3	£256.0	£43.8
Guildford Borough	Guildford Town Centre	65.8%	47.9%	34.8%	25.4%	18.9%	7.6%	14.4%	5.3%	8.6%	41.9%	20.0%	48.4%
	Ladymead Retail Park	16.8%	25.5%	24.8%	14.3%	8.1%	4.4%	8.8%	2.2%	5.1%	14.7%	10.0%	23.9%
	Sainsbury's Clay Lane	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	0.0%	0.0%	1.3%	2.7%	1.1%	0.0%	1.2%	0.0%	0.0%	0.0%	0.6%	0.2%
	Other Guildford Borough	0.0%	4.5%	0.0%	0.0%	1.0%	2.0%	1.2%	0.0%	15.7%	0.0%	3.7%	2.9%
	Sub-total Guildford Borough	**82.6%**	**77.9%**	**60.9%**	**42.4%**	**29.1%**	**14.0%**	**25.7%**	**7.5%**	**29.4%**	**56.6%**	**34.3%**	**75.5%**
Rest of Study Area	Aldershot	3.9%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	26.7%	0.0%	4.5%	1.3%
	Godalming	1.8%	1.1%	8.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.0%	1.3%	2.5%
	Horsham	0.0%	1.6%	3.0%	0.0%	2.6%	0.0%	5.2%	75.7%	0.0%	1.7%	6.8%	1.6%
	Woking	0.0%	4.4%	0.0%	1.0%	23.3%	4.9%	0.0%	1.0%	0.0%	0.0%	5.5%	2.9%
	All other in Study Area	1.6%	2.6%	10.7%	32.4%	2.5%	15.9%	21.7%	0.0%	14.2%	11.3%	12.1%	4.0%
Outside Study Area	Camberley	0.0%	0.0%	1.8%	0.0%	0.0%	1.1%	0.0%	0.0%	1.5%	1.7%	0.6%	0.3%
	Farnborough	0.0%	1.1%	0.0%	0.0%	29.2%	6.4%	0.0%	0.0%	18.7%	1.9%	9.3%	0.7%
	Kingston upon Thames	5.5%	5.4%	9.2%	0.0%	9.4%	4.1%	30.0%	0.8%	0.0%	7.4%	7.2%	6.2%
	All other outside Study Area	4.6%	4.8%	6.3%	20.1%	3.8%	53.6%	17.4%	15.0%	9.6%	5.3%	18.4%	5.0%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 10: DIY, GARDENING, ETC. - MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
	Total Expenditure	£2.9	£12.3	£4.2	£10.6	£18.5	£21.9	£14.1	£8.0	£17.6	£4.0	£114.2	£19.4
Guildford Borough	Guildford Town Centre	29.9%	38.0%	12.6%	19.1%	5.3%	5.1%	4.6%	0.8%	0.0%	10.8%	9.9%	31.3%
	Ladymead Retail Park	57.6%	44.3%	44.4%	19.6%	15.0%	4.3%	5.2%	0.8%	4.7%	9.2%	14.7%	46.3%
	Sainsbury's Clay Lane	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Tesco, Ashenden Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	1.4%	1.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.3%	0.8%
	Other Guildford Borough	0.0%	0.9%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%
	Sub-total Guildford Borough	**88.9%**	**84.1%**	**58.0%**	**39.5%**	**20.3%**	**9.3%**	**9.9%**	**1.5%**	**4.7%**	**21.1%**	**25.0%**	**79.2%**
Rest of Study Area	Aldershot	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.0%	0.3%	0.0%
	Godalming	2.9%	0.0%	26.4%	26.2%	0.0%	0.0%	0.0%	0.0%	0.0%	71.4%	6.0%	6.1%
	Horsham	0.0%	2.5%	1.0%	3.8%	0.0%	0.0%	11.9%	92.7%	0.0%	3.4%	8.7%	1.8%
	Woking	3.8%	1.9%	1.5%	0.9%	56.7%	13.3%	1.1%	0.0%	2.3%	0.0%	12.7%	2.1%
	All other in Study Area	3.4%	8.5%	9.6%	16.8%	13.5%	13.5%	65.9%	0.0%	25.9%	2.0%	19.9%	8.0%
Outside Study Area	Camberley	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%
	Farnborough	1.0%	1.0%	1.0%	0.0%	7.9%	11.3%	0.0%	0.9%	65.5%	1.0%	13.8%	1.0%
	Kingston upon Thames	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.2%	0.0%
	All other outside Study Area	0.0%	2.1%	2.5%	12.8%	1.6%	50.9%	9.3%	4.9%	0.0%	0.0%	13.0%	1.9%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

APPENDIX 10: CONVENIENCE CAPACITY ASSESSMENT

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2013 - 2033)

ZONE:	2014	2019	2024	2029	2031	2033	% GROWTH: 2014-33
Zone 1a:	24,105	25,232	26,113	26,979	27,293	27,580	14.4%
Zone 1b:	72,053	75,294	77,815	80,276	81,153	81,932	13.7%
Zone 1c:	18,679	19,467	20,158	20,787	21,012	21,217	13.6%
Zone 2:	50,870	52,729	54,585	56,252	56,873	57,459	13.0%
Zone 3:	106,625	110,341	113,944	116,932	118,051	119,184	11.8%
Zone 4:	118,336	122,815	127,086	131,185	132,662	134,069	13.3%
Zone 5:	68,158	70,262	72,754	75,114	75,999	76,859	12.8%
Zone 6:	44,358	45,897	47,528	48,976	49,520	50,045	12.8%
Zone 7:	108,913	112,436	115,814	118,851	119,961	121,028	11.1%
Zone 8:	23,065	23,899	24,747	25,499	25,774	26,032	12.9%
TOTAL:	635,162	658,372	680,544	700,851	708,298	715,405	12.6%
Zone 1 combined:	114,837	119,993	124,086	128,042	129,458	130,729	13.8%
Guildford Borough:	142,504	149,017	154,123	159,101	160,874	162,474	14.0%

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.
Base year population derived from 2012 mid-year ONS population estimates.
Projections for Study Zones are based on Experian's revised 'demographic component model'. This takes into account 2012 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.
Projections for Guildford Borough are based on the latest ONS Sub National Population Projections for all Local Authorities in England; released in May 2014.

TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:	2014 (incl SFT)	2014	2019	2024	2029	2031	2033	% GROWTH: 2014-33
SPECIAL FORMS OF TRADING (%):		2.6%	3.8%	4.8%	5.3%	5.6%	5.8%	
Zone 1a:	£2,054	£2,000	£2,029	£2,069	£2,121	£2,140	£2,161	7.0%
Zone 1b:	£2,147	£2,091	£2,122	£2,163	£2,217	£2,237	£2,259	7.0%
Zone 1c:	£2,380	£2,318	£2,352	£2,399	£2,458	£2,480	£2,505	7.0%
Zone 2:	£2,390	£2,327	£2,361	£2,408	£2,468	£2,490	£2,514	7.0%
Zone 3:	£2,228	£2,170	£2,202	£2,245	£2,301	£2,321	£2,344	7.0%
Zone 4:	£2,264	£2,205	£2,237	£2,281	£2,338	£2,359	£2,382	7.0%
Zone 5:	£2,433	£2,369	£2,404	£2,451	£2,512	£2,535	£2,560	7.0%
Zone 6:	£2,247	£2,189	£2,221	£2,265	£2,321	£2,342	£2,365	7.0%
Zone 7:	£2,128	£2,073	£2,103	£2,144	£2,198	£2,217	£2,239	7.0%
Zone 8:	£2,262	£2,203	£2,236	£2,280	£2,336	£2,357	£2,380	7.0%
Zone 1 combined:	£2,194	£2,137	£2,168	£2,210	£2,266	£2,286	£2,308	7.0%
Guildford Borough:	£2,143	£2,087	£2,118	£2,159	£2,213	£2,233	£2,255	7.0%

Source: Average spend per capita estimates are in 2013 prices and derived from Experian *'Retail Area Planner' Reports*.

Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - *Retail Planner Briefing Note 12, October 2014).*
An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year and over the forecast period based on the research and forecasts published by Experian Business Strategies in the most recent Retail Planning Briefing Note.

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2014 - 2033 (£m)

ZONE:	2014	2019	2024	2029	2031	2033	GROWTH: 2014-33 %	GROWTH: 2014-33 £m
Zone 1a:	£48.2	£51.2	£54.0	£57.2	£58.4	£59.6	23.6%	£11.4
Zone 1b:	£150.7	£159.7	£168.3	£178.0	£181.5	£185.1	22.8%	£34.4
Zone 1c:	£43.3	£45.8	£48.4	£51.1	£52.1	£53.1	22.7%	£9.8
Zone 2:	£118.4	£124.5	£131.4	£138.8	£141.6	£144.5	22.0%	£26.1
Zone 3:	£231.4	£242.9	£255.8	£269.1	£274.0	£279.4	20.8%	£48.0
Zone 4:	£260.9	£274.7	£289.9	£306.7	£312.9	£319.3	22.4%	£58.4
Zone 5:	£161.5	£168.9	£178.3	£188.7	£192.6	£196.7	21.8%	£35.2
Zone 6:	£97.1	£101.9	£107.6	£113.7	£116.0	£118.3	21.9%	£21.2
Zone 7:	£225.8	£236.5	£248.4	£261.2	£266.0	£271.0	20.1%	£45.3
Zone 8:	£50.8	£53.4	£56.4	£59.6	£60.8	£62.0	21.9%	£11.1
TOTAL STUDY AREA	£1,388.0	£1,459.7	£1,538.6	£1,624.1	£1,655.9	£1,689.1	21.7%	£301.1
Zone 1 combined:	£242.2	£256.7	£270.7	£286.3	£292.0	£297.8	23.0%	£55.6

Source: Expenditure calcualted by multiplying population (Table 1) and expenditure per capita levels (Table 2) for each zone.

TABLE 4: ALL FOOD SHOPPING - 2014. MARKET SHARE ANALYSIS (%)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
Guildford Borough	M&S Simply Food, Guildford Station	0.0%	1.1%	0.5%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.8%
	Marks & Spencer, 61-65 High Street	7.4%	0.7%	1.5%	0.6%	0.1%	0.1%	0.0%	0.0%	0.0%	0.5%	0.5%	2.2%
	Morrisons Local, 193 High St	0.7%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.4%	0.2%	0.4%
	Sainsbury's, 148-150 High Street	16.6%	3.8%	3.7%	0.2%	1.2%	0.0%	0.6%	0.0%	0.0%	0.4%	1.4%	6.3%
	Tesco Express, 7-11 Bridge Street	3.4%	1.3%	0.0%	0.6%	0.0%	0.0%	0.0%	1.3%	0.0%	0.7%	0.4%	1.5%
	Sub Total Guilford City Centre	**28.1%**	**6.9%**	**7.0%**	**1.8%**	**1.3%**	**0.1%**	**0.6%**	**1.4%**	**0.5%**	**2.0%**	**2.6%**	**11.1%**
	Ash & Tongham	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.3%	0.4%
	East Horsley	0.0%	4.1%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.5%
	Local shops, Guildford Borough	15.3%	12.2%	9.7%	0.0%	1.6%	0.2%	0.4%	2.0%	5.5%	0.5%	3.6%	12.4%
	Sainsbury's, Clay Lane	24.6%	13.3%	5.2%	1.2%	2.4%	0.0%	0.1%	0.7%	0.0%	2.0%	3.1%	14.1%
	Tesco, Ashenden Road	12.6%	27.4%	7.5%	1.4%	2.7%	0.0%	0.9%	0.0%	0.0%	0.9%	4.4%	20.9%
	Sub-Total: Guildford Borough	**80.5%**	**64.4%**	**29.3%**	**4.4%**	**8.2%**	**0.3%**	**1.9%**	**4.1%**	**7.4%**	**5.5%**	**14.4%**	**61.4%**
Rest of Study Area	Addlestone	0.0%	0.0%	0.6%	0.0%	0.1%	20.0%	0.0%	0.0%	0.4%	0.0%	3.9%	0.1%
	Aldershot	0.0%	2.6%	0.0%	0.5%	1.0%	0.0%	0.5%	0.1%	40.1%	0.0%	7.1%	1.6%
	Cobham	0.0%	12.9%	0.6%	0.0%	4.6%	1.7%	9.6%	0.3%	0.0%	0.0%	3.6%	8.1%
	Farnham	2.5%	3.3%	1.7%	0.5%	0.4%	0.1%	0.6%	0.0%	34.4%	2.6%	6.4%	2.9%
	Godalming	12.2%	2.0%	44.5%	24.1%	0.3%	0.2%	0.0%	0.0%	6.5%	85.6%	8.4%	11.6%
	Horsham	0.0%	0.2%	0.6%	1.2%	0.0%	0.1%	5.5%	87.2%	0.0%	0.0%	6.9%	0.2%
	Woking	3.8%	3.2%	2.4%	0.5%	74.5%	6.6%	1.4%	0.0%	0.8%	0.7%	14.6%	3.2%
	All other	0.0%	4.9%	19.6%	64.3%	8.6%	55.5%	73.3%	6.6%	0.6%	2.1%	27.6%	6.6%
	Sub Total: Rest of Study Area	**18.5%**	**29.1%**	**70.0%**	**91.0%**	**89.5%**	**84.3%**	**90.9%**	**94.2%**	**82.7%**	**91.0%**	**78.5%**	**34.3%**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	1.0%	6.4%	0.7%	4.5%	2.3%	15.4%	7.2%	1.7%	9.9%	3.5%	7.1%	4.3%
	Sub Total: Outside Study Area	**1.0%**	**6.4%**	**0.7%**	**4.5%**	**2.3%**	**15.4%**	**7.2%**	**1.7%**	**9.9%**	**3.5%**	**7.1%**	**4.3%**
Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: **Convenience market share analysis for main food (primary and secondary) and top-up shopping, Appendix 4.**

TABLE 5: ALL FOOD SHOPPING - 2014. MARKET SHARE ANALYSIS (£M)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£48.2	£150.7	£43.3	£118.4	£231.4	£260.9	£161.5	£97.1	£225.8	£50.8	£1,388.0	£242.2
Guildford Borough	M&S Simply Food, Guildford Railway Station	£0.0	£1.6	£0.2	£0.5	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£2.6	£1.9
	Marks & Spencer, 61-65 High Street	£3.6	£1.1	£0.6	£0.7	£0.2	£0.3	£0.0	£0.0	£0.0	£0.2	£6.7	£5.3
	Morrisons Local, 193 High St	£0.3	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.2	£2.2	£0.9
	Sainsbury's, 148-150 High Street	£8.0	£5.7	£1.6	£0.2	£2.7	£0.0	£1.0	£0.0	£0.0	£0.2	£19.4	£15.3
	Tesco Express, 7-11 Bridge Street	£1.6	£1.9	£0.0	£0.7	£0.0	£0.0	£0.0	£1.2	£0.0	£0.4	£5.8	£3.5
	Sub Total Guilford City Centre	**£13.5**	**£10.3**	**£3.0**	**£2.1**	**£2.9**	**£0.3**	**£1.0**	**£1.4**	**£1.1**	**£1.0**	**£36.7**	**£26.9**
	Ash & Tongham	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.1	£0.0	£4.1	£0.9
	East Horsley	£0.0	£6.1	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£6.8	£6.1
	Local shops, Guildford Borough	£7.4	£18.4	£4.2	£0.0	£3.6	£0.6	£0.6	£1.9	£12.5	£0.3	£49.5	£30.0
	Sainsbury's, Clay Lane	£11.8	£20.0	£2.2	£1.4	£5.5	£0.0	£0.2	£0.7	£0.0	£1.0	£42.8	£34.1
	Tesco, Ashenden Road	£6.1	£41.3	£3.2	£1.7	£6.3	£0.0	£1.4	£0.0	£0.0	£0.5	£60.4	£50.6
	Sub-Total: Guildford Borough	**£38.8**	**£97.1**	**£12.7**	**£5.3**	**£18.9**	**£0.9**	**£3.1**	**£4.0**	**£16.8**	**£2.8**	**£200.3**	**£148.6**
Rest of Study Area	Addlestone	£0.0	£0.0	£0.2	£0.0	£0.2	£52.2	£0.0	£0.0	£1.0	£0.0	£53.6	£0.2
	Aldershot	£0.0	£3.9	£0.0	£0.6	£2.2	£0.0	£0.8	£0.1	£90.5	£0.0	£98.2	£3.9
	Cobham	£0.0	£19.4	£0.3	£0.0	£10.7	£4.5	£15.5	£0.3	£0.0	£0.0	£50.6	£19.7
	Farnham	£1.2	£5.0	£0.7	£0.5	£1.0	£0.3	£1.0	£0.0	£77.6	£1.3	£88.7	£7.0
	Godalming	£5.9	£3.0	£19.3	£28.5	£0.7	£0.6	£0.0	£0.0	£14.6	£43.5	£116.0	£28.2
	Horsham	£0.0	£0.3	£0.2	£1.4	£0.0	£0.3	£8.9	£84.7	£0.0	£0.0	£95.8	£0.5
	Woking	£1.8	£4.8	£1.0	£0.6	£172.4	£17.3	£2.3	£0.0	£1.7	£0.4	£202.4	£7.7
	All other	£0.0	£7.4	£8.5	£76.1	£19.8	£144.8	£118.3	£6.4	£1.3	£1.1	£383.7	£15.9
	Sub Total: Rest of Study Area	**£8.9**	**£43.9**	**£30.3**	**£107.8**	**£207.1**	**£219.8**	**£146.8**	**£91.5**	**£186.8**	**£46.3**	**£1,089.0**	**£83.1**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	£0.5	£9.7	£0.3	£5.4	£5.4	£40.2	£11.6	£1.7	£22.2	£1.8	£98.7	£10.5
	Sub Total: Outside Study Area	**£0.5**	**£9.7**	**£0.3**	**£5.4**	**£5.4**	**£40.2**	**£11.6**	**£1.7**	**£22.2**	**£1.8**	**£98.7**	**£10.5**
Total		£48.2	£150.7	£43.3	£118.4	£231.4	£260.9	£161.5	£97.1	£225.8	£50.8	£1,388.0	£242.2

Source: **Table 3 and Table 4**

TABLE 6: ALL FOOD SHOPPING - 2019 MARKET SHARE ANALYSIS (£M)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£51.2	£159.7	£45.8	£124.5	£242.9	£274.7	£168.9	£101.9	£236.5	£53.4	£1,459.7	£256.7
Guildford Borough	M&S Simply Food, Guildford Station	£0.0	£1.7	£0.2	£0.6	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£2.7	£2.0
	Marks & Spencer, 61-65 High Street	£3.8	£1.2	£0.7	£0.7	£0.2	£0.3	£0.0	£0.0	£0.0	£0.3	£7.1	£5.6
	Morrisons Local, 193 High St	£0.3	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.2	£2.3	£0.9
	Sainsbury's, 148-150 High Street	£8.51	£6.0	£1.7	£0.2	£2.8	£0.0	£1.0	£0.0	£0.0	£0.2	£20.5	£16.2
	Tesco Express, 7-11 Bridge Street	£1.73	£2.0	£0.0	£0.7	£0.0	£0.0	£0.0	£1.3	£0.0	£0.4	£6.2	£3.8
	Sub Total Guilford City Centre	**£14.4**	**£11.0**	**£3.2**	**£2.2**	**£3.1**	**£0.3**	**£1.0**	**£1.4**	**£1.2**	**£1.1**	**£38.8**	**£28.5**
	Ash & Tongham	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.3	£0.0	£4.3	£1.0
	East Horsley	£0.0	£6.5	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£7.2	£6.5
	Local shops, Guildford Borough	£7.81	£19.5	£4.5	£0.0	£3.8	£0.7	£0.6	£2.0	£13.1	£0.3	£52.2	£31.8
	Sainsbury's, Clay Lane	£12.57	£21.2	£2.4	£1.5	£5.7	£0.0	£0.2	£0.7	£0.0	£1.1	£45.3	£36.1
	Tesco, Ashenden Road	£6.46	£43.8	£3.4	£1.8	£6.6	£0.0	£1.5	£0.0	£0.0	£0.5	£63.9	£53.6
	Sub-Total: Guildford Borough	**£41.2**	**£102.9**	**£13.4**	**£5.5**	**£19.9**	**£0.9**	**£3.2**	**£4.2**	**£17.5**	**£2.9**	**£211.8**	**£157.5**
Rest of Study Area	Addlestone	£0.0	£0.0	£0.3	£0.0	£0.2	£54.9	£0.0	£0.0	£1.1	£0.0	£56.5	£0.3
	Aldershot	£0.0	£4.2	£0.0	£0.7	£2.3	£0.0	£0.8	£0.1	£94.8	£0.0	£102.9	£4.2
	Cobham	£0.0	£20.6	£0.3	£0.0	£11.2	£4.7	£16.2	£0.3	£0.0	£0.0	£53.2	£20.9
	Farnham	£1.30	£5.3	£0.8	£0.6	£1.1	£0.3	£1.0	£0.0	£81.3	£1.4	£93.0	£7.4
	Godalming	£6.26	£3.2	£20.4	£29.9	£0.8	£0.6	£0.0	£0.0	£15.3	£45.7	£122.1	£29.9
	Horsham	£0.0	£0.3	£0.3	£1.5	£0.0	£0.3	£9.3	£88.9	£0.0	£0.0	£100.5	£0.6
	Woking	£1.93	£5.1	£1.1	£0.7	£181.0	£18.3	£2.4	£0.0	£1.8	£0.4	£212.7	£8.1
	All other	£0.0	£7.9	£9.0	£80.0	£20.8	£152.5	£123.7	£6.7	£1.4	£1.1	£403.1	£16.9
	Sub Total: Rest of Study Area	**£9.49**	**£46.5**	**£32.0**	**£113.3**	**£217.4**	**£231.5**	**£153.5**	**£96.0**	**£195.6**	**£48.6**	**£1,144.1**	**£88.1**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	£0.49	£10.3	£0.3	£5.7	£5.7	£42.3	£12.1	£1.8	£23.3	£1.9	£103.8	£11.1
	Sub Total: Outside Study Area	**£0.49**	**£10.3**	**£0.3**	**£5.7**	**£5.7**	**£42.3**	**£12.1**	**£1.8**	**£23.3**	**£1.9**	**£103.8**	**£11.1**
Total		£51.2	£159.7	£45.8	£124.5	£242.9	£274.7	£168.9	£101.9	£236.5	£53.4	£1,459.7	£256.7

Source: **Table 3 and Table 4**

TABLE 7: ALL FOOD SHOPPING - 2024 MARKET SHARE ANALYSIS (£M)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£54.0	£168.3	£48.4	£131.4	£255.8	£289.9	£178.3	£107.6	£248.4	£56.4	£1,538.6	£270.7
Guildford Borough	M&S Simply Food, Guildford Railway Station	£0.0	£1.8	£0.2	£0.6	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£2.8	£2.1
	Marks & Spencer, 61-65 High Street	£4.0	£1.2	£0.7	£0.7	£0.3	£0.3	£0.0	£0.0	£0.0	£0.3	£7.5	£5.9
	Morrisons Local, 193 High St	£0.4	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.2	£0.2	£2.4	£1.0
	Sainsbury's, 148-150 High Street	£9.0	£6.3	£1.8	£0.3	£3.0	£0.0	£1.1	£0.0	£0.0	£0.2	£21.6	£17.1
	Tesco Express, 7-11 Bridge Street	£1.8	£2.1	£0.0	£0.8	£0.0	£0.0	£0.0	£1.4	£0.0	£0.4	£6.5	£4.0
	Sub Total Guilford City Centre	**£15.2**	**£11.5**	**£3.4**	**£2.4**	**£3.2**	**£0.3**	**£1.1**	**£1.5**	**£1.2**	**£1.1**	**£40.9**	**£30.1**
	Ash & Tongham	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.4	£0.0	£4.5	£1.1
	East Horsley	£0.0	£6.8	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£7.6	£6.8
	Local shops, Guildford Borough	£8.2	£20.6	£4.7	£0.0	£4.0	£0.7	£0.6	£2.1	£13.8	£0.3	£55.0	£33.5
	Sainsbury's, Clay Lane	£13.3	£22.3	£2.5	£1.6	£6.0	£0.0	£0.2	£0.7	£0.0	£1.1	£47.8	£38.1
	Tesco, Ashenden Road	£6.8	£46.1	£3.6	£1.9	£6.9	£0.0	£1.5	£0.0	£0.0	£0.5	£67.4	£56.5
	Sub-Total: Guildford Borough	**£43.5**	**£108.5**	**£14.2**	**£5.8**	**£20.9**	**£1.0**	**£3.4**	**£4.4**	**£18.4**	**£3.1**	**£223.2**	**£166.1**
Rest of Study Area	Addlestone	£0.0	£0.0	£0.3	£0.0	£0.3	£58.0	£0.0	£0.0	£1.1	£0.0	£59.6	£0.3
	Aldershot	£0.0	£4.4	£0.0	£0.7	£2.4	£0.0	£0.9	£0.1	£99.6	£0.0	£108.1	£4.4
	Cobham	£0.0	£21.7	£0.3	£0.0	£11.8	£4.9	£17.1	£0.3	£0.0	£0.0	£56.1	£22.0
	Farnham	£1.4	£5.6	£0.8	£0.6	£1.1	£0.3	£1.1	£0.0	£85.4	£1.5	£97.7	£7.8
	Godalming	£6.6	£3.4	£21.5	£31.6	£0.8	£0.6	£0.0	£0.0	£16.1	£48.3	£128.9	£31.5
	Horsham	£0.0	£0.3	£0.3	£1.6	£0.0	£0.3	£9.8	£93.9	£0.0	£0.0	£106.1	£0.6
	Woking	£2.0	£5.4	£1.2	£0.7	£190.6	£19.3	£2.6	£0.0	£1.9	£0.4	£224.0	£8.6
	All other	£0.0	£8.3	£9.5	£84.5	£21.9	£160.9	£130.6	£7.1	£1.4	£1.2	£425.4	£17.8
	Sub Total: Rest of Study Area	**£10.0**	**£49.0**	**£33.8**	**£119.6**	**£228.9**	**£244.2**	**£162.1**	**£101.4**	**£205.4**	**£51.3**	**£1,206.0**	**£92.9**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	£0.5	£10.8	£0.3	£6.0	£6.0	£44.6	£12.8	£1.9	£24.5	£2.0	£109.4	£11.7
	Sub Total: Outside Study Area	**£0.5**	**£10.8**	**£0.3**	**£6.0**	**£6.0**	**£44.6**	**£12.8**	**£1.9**	**£24.5**	**£2.0**	**£109.4**	**£11.7**
Total		£54.0	£168.3	£48.4	£131.4	£255.8	£289.9	£178.3	£107.6	£248.4	£56.4	£1,538.6	£270.7

Source: Table 3 and Table 4

TABLE 8: ALL FOOD SHOPPING - 2029 MARKET SHARE ANALYSIS (£M)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£57.2	£178.0	£51.1	£138.8	£269.1	£306.7	£188.7	£113.7	£261.2	£59.6	£1,624.1	£286.3
Guildford Borough	M&S Simply Food, Guildford Station	£0.0	£1.9	£0.2	£0.6	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£3.0	£2.2
	Marks & Spencer, 61-65 High Street	£4.2	£1.3	£0.8	£0.8	£0.3	£0.3	£0.0	£0.0	£0.0	£0.3	£8.0	£6.3
	Morrisons Local, 193 High St	£0.4	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.2	£2.6	£1.0
	Sainsbury's, 148-150 High Street	£9.5	£6.7	£1.9	£0.3	£3.1	£0.0	£1.1	£0.0	£0.0	£0.3	£22.9	£18.1
	Tesco Express, 7-11 Bridge Street	£1.9	£2.3	£0.0	£0.8	£0.0	£0.0	£0.0	£1.4	£0.0	£0.4	£6.9	£4.2
	Sub Total Guilford City Centre	**£16.1**	**£12.2**	**£3.6**	**£2.5**	**£3.4**	**£0.3**	**£1.1**	**£1.6**	**£1.3**	**£1.2**	**£43.3**	**£31.8**
	Ash & Tongham	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.6	£0.0	£4.7	£1.1
	East Horsley	£0.0	£7.2	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£8.0	£7.2
	Local shops, Guildford Borough	£8.7	£21.8	£5.0	£0.0	£4.2	£0.7	£0.7	£2.2	£14.5	£0.3	£58.1	£35.5
	Sainsbury's, Clay Lane	£14.1	£23.6	£2.6	£1.7	£6.4	£0.0	£0.2	£0.8	£0.0	£1.2	£50.5	£40.3
	Tesco, Ashenden Road	£7.2	£48.8	£3.8	£2.0	£7.3	£0.0	£1.6	£0.0	£0.0	£0.6	£71.2	£59.8
	Sub-Total: Guildford Borough	**£46.1**	**£114.7**	**£15.0**	**£6.2**	**£22.0**	**£1.1**	**£3.6**	**£4.6**	**£19.4**	**£3.3**	**£235.9**	**£175.7**
Rest of Study Area	Addlestone	£0.0	£0.0	£0.3	£0.0	£0.3	£61.3	£0.0	£0.0	£1.2	£0.0	£63.0	£0.3
	Aldershot	£0.0	£4.7	£0.0	£0.7	£2.6	£0.0	£0.9	£0.1	£104.8	£0.0	£113.8	£4.7
	Cobham	£0.0	£22.9	£0.3	£0.0	£12.4	£5.2	£18.1	£0.3	£0.0	£0.0	£59.3	£23.3
	Farnham	£1.5	£5.9	£0.9	£0.6	£1.2	£0.3	£1.1	£0.0	£89.8	£1.6	£102.9	£8.2
	Godalming	£7.0	£3.6	£22.7	£33.4	£0.9	£0.7	£0.0	£0.0	£16.9	£51.0	£136.1	£33.3
	Horsham	£0.0	£0.3	£0.3	£1.6	£0.0	£0.3	£10.4	£99.1	£0.0	£0.0	£112.1	£0.6
	Woking	£2.2	£5.7	£1.2	£0.7	£200.4	£20.4	£2.7	£0.0	£2.0	£0.4	£235.8	£9.1
	All other	£0.0	£8.8	£10.0	£89.2	£23.1	£170.2	£138.3	£7.5	£1.5	£1.3	£449.8	£18.8
	Sub Total: Rest of Study Area	**£10.6**	**£51.8**	**£35.8**	**£126.4**	**£240.8**	**£258.4**	**£171.5**	**£107.1**	**£216.1**	**£54.2**	**£1,272.7**	**£98.3**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	£0.5	£11.4	£0.4	£6.3	£6.3	£47.2	£13.6	£2.0	£25.7	£2.1	£115.5	£12.4
	Sub Total: Outside Study Area	**£0.5**	**£11.4**	**£0.4**	**£6.3**	**£6.3**	**£47.2**	**£13.6**	**£2.0**	**£25.7**	**£2.1**	**£115.5**	**£12.4**
Total		£57.2	£178.0	£51.1	£138.8	£269.1	£306.7	£188.7	£113.7	£261.2	£59.6	£1,624.1	£286.3

Source: Table 3 and Table 4

TABLE 9: ALL FOOD SHOPPING - 2031 MARKET SHARE ANALYSIS (£M)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£58.4	£181.5	£52.1	£141.6	£274.0	£312.9	£192.6	£116.0	£266.0	£60.8	£1,655.9	£292.0
Guildford Borough	M&S Simply Food, Guildford Railway Station	£0.0	£2.0	£0.3	£0.7	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£3.1	£2.2
	Marks & Spencer, 61-65 High Street	£4.3	£1.3	£0.8	£0.8	£0.3	£0.3	£0.0	£0.0	£0.0	£0.3	£8.1	£6.4
	Morrisons Local, 193 High St	£0.4	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.2	£2.6	£1.1
	Sainsbury's, 148-150 High Street	£9.7	£6.8	£1.9	£0.3	£3.2	£0.0	£1.2	£0.0	£0.0	£0.3	£23.3	£18.4
	Tesco Express, 7-11 Bridge Street	£2.0	£2.3	£0.0	£0.8	£0.0	£0.0	£0.0	£1.5	£0.0	£0.5	£7.0	£4.3
	Sub Total Guilford City Centre	**£16.4**	**£12.4**	**£3.6**	**£2.5**	**£3.4**	**£0.3**	**£1.2**	**£1.6**	**£1.3**	**£1.2**	**£44.1**	**£32.4**
	Ash & Tongham	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.7	£0.0	£4.8	£1.1
	East Horsley	£0.0	£7.4	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£8.2	£7.4
	Local shops, Guildford Borough	£8.9	£22.2	£5.1	£0.0	£4.3	£0.7	£0.7	£2.3	£14.7	£0.3	£59.2	£36.2
	Sainsbury's, Clay Lane	£14.3	£24.1	£2.7	£1.7	£6.5	£0.0	£0.2	£0.8	£0.0	£1.2	£51.5	£41.1
	Tesco, Ashenden Road	£7.4	£49.7	£3.9	£2.0	£7.4	£0.0	£1.7	£0.0	£0.0	£0.6	£72.7	£61.0
	Sub-Total: Guildford Borough	**£47.0**	**£117.0**	**£15.3**	**£6.3**	**£22.4**	**£1.1**	**£3.7**	**£4.7**	**£19.7**	**£3.3**	**£240.5**	**£179.2**
Rest of Study Area	Addlestone	£0.0	£0.0	£0.3	£0.0	£0.3	£62.5	£0.0	£0.0	£1.2	£0.0	£64.3	£0.3
	Aldershot	£0.0	£4.7	£0.0	£0.8	£2.6	£0.0	£1.0	£0.1	£106.7	£0.0	£115.9	£4.8
	Cobham	£0.0	£23.4	£0.3	£0.0	£12.6	£5.3	£18.5	£0.3	£0.0	£0.0	£60.5	£23.7
	Farnham	£1.5	£6.0	£0.9	£0.7	£1.2	£0.3	£1.1	£0.0	£91.4	£1.6	£104.8	£8.4
	Godalming	£7.1	£3.6	£23.2	£34.1	£0.9	£0.7	£0.0	£0.0	£17.2	£52.0	£138.7	£34.0
	Horsham	£0.0	£0.3	£0.3	£1.7	£0.0	£0.3	£10.6	£101.1	£0.0	£0.0	£114.4	£0.6
	Woking	£2.2	£5.8	£1.3	£0.8	£204.1	£20.8	£2.8	£0.0	£2.0	£0.4	£240.2	£9.2
	All other	£0.0	£9.0	£10.2	£91.0	£23.5	£173.6	£141.1	£7.7	£1.5	£1.3	£458.9	£19.2
	Sub Total: Rest of Study Area	**£10.8**	**£52.9**	**£36.5**	**£128.9**	**£245.3**	**£263.6**	**£175.1**	**£109.2**	**£220.0**	**£55.3**	**£1,297.6**	**£100.2**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	£0.6	£11.7	£0.4	£6.4	£6.4	£48.2	£13.8	£2.0	£26.2	£2.1	£117.8	£12.6
	Sub Total: Outside Study Area	**£0.6**	**£11.7**	**£0.4**	**£6.4**	**£6.4**	**£48.2**	**£13.8**	**£2.0**	**£26.2**	**£2.1**	**£117.8**	**£12.6**
Total		£58.4	£181.5	£52.1	£141.6	£274.0	£312.9	£192.6	£116.0	£266.0	£60.8	£1,655.9	£292.0

Source: Table 3 and Table 4

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TABLE 10: ALL FOOD SHOPPING - 2033 MARKET SHARE ANALYSIS (£M)

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£59.6	£185.1	£53.1	£144.5	£279.4	£319.3	£196.7	£118.3	£271.0	£62.0	£1,689.1	£297.8
Guildford Borough	M&S Simply Food, Guildford Railway Station	£0.0	£2.0	£0.3	£0.7	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£3.1	£2.3
	Marks & Spencer, 61-65 High Street	£4.4	£1.4	£0.8	£0.8	£0.3	£0.3	£0.0	£0.0	£0.0	£0.3	£8.3	£6.6
	Morrisons Local, 193 High St	£0.4	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.2	£2.7	£1.1
	Sainsbury's, 148-150 High Street	£9.9	£7.0	£2.0	£0.3	£3.2	£0.0	£1.2	£0.0	£0.0	£0.3	£23.8	£18.8
	Tesco Express, 7-11 Bridge Street	£2.0	£2.4	£0.0	£0.8	£0.0	£0.0	£0.0	£1.5	£0.0	£0.5	£7.2	£4.4
	Sub Total Guilford City Centre	**£16.7**	**£12.7**	**£3.7**	**£2.6**	**£3.5**	**£0.3**	**£1.2**	**£1.7**	**£1.3**	**£1.3**	**£45.0**	**£33.1**
	Ash & Tongham	£0.0	£1.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.8	£0.0	£4.9	£1.2
	East Horsley	£0.0	£7.5	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0	£8.3	£7.5
	Local shops, Guildford Borough	£9.1	£22.6	£5.2	£0.0	£4.3	£0.8	£0.7	£2.3	£15.0	£0.3	£60.4	£36.9
	Sainsbury's, Clay Lane	£14.6	£24.6	£2.7	£1.8	£6.6	£0.0	£0.2	£0.8	£0.0	£1.3	£52.6	£41.9
	Tesco, Ashenden Road	£7.5	£50.7	£4.0	£2.1	£7.6	£0.0	£1.7	£0.0	£0.0	£0.6	£74.1	£62.2
	Sub-Total: Guildford Borough	**£48.0**	**£119.3**	**£15.6**	**£6.4**	**£22.8**	**£1.1**	**£3.8**	**£4.8**	**£20.1**	**£3.4**	**£245.3**	**£182.8**
Rest of Study Area	Addlestone	£0.0	£0.0	£0.3	£0.0	£0.3	£63.8	£0.0	£0.0	£1.2	£0.0	£65.6	£0.3
	Aldershot	£0.0	£4.8	£0.0	£0.8	£2.7	£0.0	£1.0	£0.1	£108.7	£0.0	£118.1	£4.8
	Cobham	£0.0	£23.8	£0.3	£0.0	£12.9	£5.4	£18.9	£0.3	£0.0	£0.0	£61.7	£24.2
	Farnham	£1.5	£6.1	£0.9	£0.7	£1.2	£0.3	£1.2	£0.0	£93.2	£1.6	£106.8	£8.6
	Godalming	£7.3	£3.7	£23.6	£34.7	£0.9	£0.7	£0.0	£0.0	£17.5	£53.0	£141.5	£34.6
	Horsham	£0.0	£0.4	£0.3	£1.7	£0.0	£0.3	£10.8	£103.2	£0.0	£0.0	£116.7	£0.6
	Woking	£2.2	£5.9	£1.3	£0.8	£208.1	£21.2	£2.8	£0.0	£2.1	£0.5	£244.9	£9.4
	All other	£0.0	£9.1	£10.4	£92.8	£24.0	£177.2	£144.1	£7.8	£1.6	£1.3	£468.4	£19.6
	Sub Total: Rest of Study Area	**£11.0**	**£53.9**	**£37.2**	**£131.5**	**£250.1**	**£269.1**	**£178.8**	**£111.5**	**£224.2**	**£56.4**	**£1,323.7**	**£102.1**
Outside Study Area	Camberley, Kingston-Upon-Thames, Reigate, etc.	£0.6	£11.9	£0.4	£6.6	£6.5	£49.2	£14.1	£2.0	£26.7	£2.2	£120.1	£12.8
	Sub Total: Outside Study Area	**£0.6**	**£11.9**	**£0.4**	**£6.6**	**£6.5**	**£49.2**	**£14.1**	**£2.0**	**£26.7**	**£2.2**	**£120.1**	**£12.8**
Total		£59.6	£185.1	£53.1	£144.5	£279.4	£319.3	£196.7	£118.3	£271.0	£62.0	£1,689.1	£297.8

Source: Table 3 and Table 4

TABLE 11: TRADE DRAW FROM OUTSIDE THE STUDY AREA AND TOTAL TURNOVER

	Estimated Trade Draw from	2014	2019	2024	2029	2031	2033
Guildford Town Centre	10%	£40.8	£43.1	£45.5	£48.1	£49.1	£50.0
Ash & Tongham	0%	£4.1	£4.3	£4.5	£4.7	£4.8	£4.9
East Horsley	0%	£6.8	£7.2	£7.6	£8.0	£8.2	£8.3
All other stores in the District	0%	£49.5	£52.2	£55.0	£58.1	£59.2	£60.4
Out of Centre	5%	£108.7	£115.0	£121.3	£128.2	£130.7	£133.3
Total		£209.8	£221.9	£233.8	£247.1	£252.0	£257.0

Notes: Trade draw assumptions are based on expenditure from passing trade and tourism.

TABLE 12: COMMITTED OR PLANNED CONVENIENCE FLOORSPACE

	LPA Planning Ref	Estimated Sales Area (m^2 net)	Average Sales (£ per m^2)	2014 £m	2019 £m	2024 £m	2029 £m	2031 £m	2033 £m
(1) Waitrose, York Road, Guildford	12/P/01020	1,658	£11,500	£19.1	£18.8	£18.8	£18.9	£18.9	£19.0
(2) Aldi, London Road, Burpham	13/P/02028	778	£8,500	£6.6	£6.5	£6.5	£6.6	£6.6	£6.6
(3) Convenience store, 120 Ash Street, Ash	12/P/01947	260	£6,000	£1.6	£1.5	£1.5	£1.5	£1.5	£1.6
Total		2,696		**£27.2**	**£26.9**	**£26.9**	**£27.0**	**£27.0**	**£27.1**

Source:
(1) Net sales convenience floorspace equates to 85% of total net sales floorspace of 1,951m^2. Sales density is based on information from Mintel Retail Rankings and comparable schemes.
(2) Convenience net sales floorspace estimated as 80% of total net sales of 972m^2. Sales density is based on information from Mintel Retail Rankings and comparable schemes.
(3) Net sales floorspace based on 70% of gross floorspace of 371m^2 and assuming 100% of net sales floorspace dedicated to convenience goods. Sales density is based on comparable schemes.

TABLE 13: GUILDFORD BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031	2033
STEP 1:	TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£209.8	£221.9	£233.8	£247.1	£252.0	£257.0
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£209.8	£207.1	£206.9	£207.9	£208.3	£208.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£14.8	£27.0	£39.2	£43.7	£48.2
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£27.2	£26.9	£26.9	£27.0	£27.0	£27.1
STEP 5:	NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):	-£27.2	-£12.1	£0.1	£12.2	£16.6	£21.1
STEP 6:	FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:						
	Foodstore						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£12,250	£12,092	£12,079	£12,140	£12,164	£12,189
ii	Net Floorspace Capacity (m^2):	-	-999	11	1,005	1,366	1,734
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	-1,428	16	1,436	1,951	2,477
	Deep Discounter						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£6,000	£5,922	£5,916	£5,946	£5,958	£5,970
ii	Net Floorspace Capacity (m^2):	-	-2,041	22	2,053	2,789	3,540
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	-2,915	32	2,932	3,984	5,057

Step 1: identifies the total 'potential' turnover of all existing convenience goods floorspace at 2014 (based on Table 11). The growth in 'potential' turnover up to 2033 assumes constant market shares over the forecast period.

Step 2: sets out the total 'benchmark' turnover of existing convenience goods floorspace at 2014. Make an allowance for annual floorspace 'productivity' growth ranging from -0.3% to +0.1%.

Step 3: sets out the forecast residual expenditure capacity available to support new convenience goods floorspace over the forecast period (i.e. the difference between the 'benchmark' and 'potential' turnovers).

Step 4: identifies the forecast convenience goods turnover of all committed floorspace that had planning permission at the time of preparing this assessment a (based on Table 13). Allow for growth in 'productivity' of all committed floorspace (as above).

Step 5: shows the net residual expenditure available to support new convenience goods floorspace after taking account of all new commitments.
Step 6: forecasts the capacity for major new superstore and/or smaller format supermarket floorspace. This assumes a major superstore operator achieves an average sales density of circa £12,250 per m^2 in 2014, which is based on the published average sales figures for Asda, Tesco, Sainsbury's, Morrisons and Waitrose. For a smaller format supermarket and/or deep discounter we have assumed an average sales density of £6,000 per m^2 and this is based on the published sales levels for a range of operators including, Co-Op, Budgens, Lidl and Aldi.

TABLE 14: GUILDFORD TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031	2033
STEP 1:	TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£40.8	£43.1	£45.5	£48.1	£49.1	£50.0
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£40.8	£40.2	£40.2	£40.4	£40.5	£40.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£2.9	£5.3	£7.7	£8.6	£9.5
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m):	£19.1	£18.8	£18.8	£18.9	£18.9	£19.0
STEP 5:	NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):	-£19.1	-£15.9	-£13.5	-£11.2	-£10.4	-£9.5
STEP 6:	FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:						
	Foodstore						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£12,250	£12,092	£12,079	£12,140	£12,164	£12,189
ii	Net Floorspace Capacity (m^2):	-	-1,318	-1,119	-924	-853	-780
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	-1,883	-1,599	-1,320	-1,218	-1,114
	Deep Discounter						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£6,000	£5,922	£5,916	£5,946	£5,958	£5,970
ii	Net Floorspace Capacity (m^2):	-	-2,691	-2,285	-1,886	-1,741	-1,592
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	-3,844	-3,264	-2,694	-2,487	-2,275

TABLE 15: WHARF ROAD, ASH DISTRICT CENTRE- CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO

Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031	2033
STEP 1:	TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£4.1	£4.3	£4.5	£4.7	£4.8	£4.9
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£4.1	£4.0	£4.0	£4.0	£4.0	£4.1
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.3	£0.5	£0.7	£0.8	£0.9
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£1.6	£1.5	£1.5	£1.5	£1.5	£1.6
STEP 5:	NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):	-£1.6	-£1.3	-£1.1	-£0.8	-£0.8	-£0.7
STEP 6:	FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:						
	Foodstore						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£12,250	£12,092	£12,079	£12,140	£12,164	£12,189
ii	Net Floorspace Capacity (m^2):	-	-106	-87	-70	-63	-56
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	-151	-125	-99	-90	-81
	Deep Discounter						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£6,000	£5,922	£5,916	£5,946	£5,958	£5,970
ii	Net Floorspace Capacity (m^2):	-	-216	-178	-142	-129	-115
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	-309	-255	-203	-184	-164

TABLE 16: EAST HORSLEY - CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO

Assume Equilibrium at Base Year and Constant Market Shares

		2014	2019	2024	2029	2031	2033
STEP 1:	TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£6.8	£7.2	£7.6	£8.0	£8.2	£8.3
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£6.8	£6.7	£6.7	£6.7	£6.7	£6.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.5	£0.9	£1.3	£1.4	£1.6
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):	£0.0	£0.5	£0.9	£1.3	£1.4	£1.6
STEP 6:	FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:						
	Foodstore						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£12,250	£12,092	£12,079	£12,140	£12,164	£12,189
ii	Net Floorspace Capacity (m^2):	0	41	73	105	117	129
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	58	104	151	167	184
	Deep Discounter						
i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£6,000	£5,922	£5,916	£5,946	£5,958	£5,970
ii	Net Floorspace Capacity (m^2):	-	83	149	215	239	263
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (m^2):	-	118	213	308	342	376

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TABLE 17: REST OF BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Equilibrium at Base Year and Constant Market Shares

			2014	2019	2024	2029	2031	2033
STEP 1:		TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£158.2	£167.3	£176.3	£186.3	£189.9	£193.7
STEP 2:		TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):	£158.2	£156.1	£155.9	£156.7	£157.0	£157.4
STEP 3:		NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£11.2	£20.3	£29.5	£32.9	£36.3
STEP 4:		CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£6.5	£6.5	£6.6	£6.6	£6.6
STEP 5:		NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):	£0.0	£4.6	£13.8	£23.0	£26.3	£29.8
STEP 6:		FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:						
		Foodstore						
	i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£12,250	£12,092	£12,079	£12,140	£12,164	£12,189
	ii	Net Floorspace Capacity (m^2):	0	384	1,145	1,893	2,165	2,441
	iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	iv	Gross Floorspace Capacity (m^2):	-	548	1,635	2,705	3,092	3,488
		Deep Discounter						
	i	Estimated Average Sales Density of New Floorspace (£ per m^2):	£6,000	£5,922	£5,916	£5,946	£5,958	£5,970
	ii	Net Floorspace Capacity (m^2):	-	784	2,337	3,865	4,419	4,984
	iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
	iv	Gross Floorspace Capacity (m^2):	-	1,119	3,338	5,522	6,313	7,121

TABLE 18: BENCHMARK CONVENIENCE TURNOVER IN GUILDFORD BOROUGH

Main Foodstores	Gross (m^2)	Net Sales (m^2)	% Convenience Sales of Total	Convenience Sales (m^2)	Sales Density (per m^2)	Turnover 2014	2019	2024	2029	2031	2033
Guildford Town Centre:											
M&S Simply Food, Guildford Railway Station	107	70	100%	70	£10,685	£0.7	£0.7	£0.7	£0.7	£0.7	£0.7
Marks & Spencer, 61-65 High Street	2,033	1,322	95%	1,256	£10,685	£13.4	£13.2	£13.2	£13.3	£13.3	£13.4
Morrisons Local, 193 High St	723	306	95%	291	£12,010	£3.5	£3.4	£3.4	£3.5	£3.5	£3.5
Sainsbury's, 148-150 High Street	2,865	872	90%	785	£12,931	£10.1	£10.0	£10.0	£10.1	£10.1	£10.1
Tesco Express, 7-11 Bridge Street	350	228	95%	217	£10,521	£2.3	£2.2	£2.2	£2.3	£2.3	£2.3
Other Town Centre	772	540	100%	540	£4,437	£2.4	£2.4	£2.4	£2.4	£2.4	£2.4
District and Local Centres:											
Budgens (Duffy's), Ash District Centre	598	598	95%	568	£6,902	£3.9	£3.9	£3.9	£3.9	£3.9	£3.9
Budgens, East Horsley District Centre	357	250	95%	237	£6,902	£1.6	£1.6	£1.6	£1.6	£1.6	£1.6
Budgens, Ripley Local Centre	449	271	95%	257	£6,902	£1.8	£1.8	£1.8	£1.8	£1.8	£1.8
Co-op, 48 Woodbridge Hill Local Centre	334	234	95%	222	£7,272	£1.6	£1.6	£1.6	£1.6	£1.6	£1.6
Co-op, 121b Aldershot Road Local Centre	1,110	777	95%	738	£7,272	£5.4	£5.3	£5.3	£5.3	£5.3	£5.3
Co-op Madrid Road Local Centre	248	174	95%	165	£7,272	£1.2	£1.2	£1.2	£1.2	£1.2	£1.2
Co-op, Shere Local Centre	211	148	95%	141	£7,272	£1.0	£1.0	£1.0	£1.0	£1.0	£1.0
M&S Simply Food, BP Merrow, Epsom Road	368	258	95%	245	£10,685	£2.6	£2.6	£2.6	£2.6	£2.6	£2.6
Other Ash District Centre	71	50	100%	50	£4,437	£0.2	£0.2	£0.2	£0.2	£0.2	£0.2
Other East Horsley District Centre	372	260	200%	521	£4,437	£2.3	£2.3	£2.3	£2.3	£2.3	£2.3
Other local stores	4,074	2,852	100%	2,852	£4,437	£12.7	£12.5	£12.5	£12.5	£12.6	£12.6
Out of Centre:											
Sainsbury's, Clay Lane	7,381	5,554	60%	3,332	£12,931	£43.1	£42.5	£42.5	£42.7	£42.8	£42.9
Tesco, Ashenden Road	6,056	3,987	60%	2,392	£10,521	£25.2	£24.8	£24.8	£24.9	£25.0	£25.0
TOTAL	**28,479**	**18,750**		**14,809**		**£135.1**	**£133.3**	**£133.2**	**£133.9**	**£134.1**	**£134.4**

Source: Town Centre Survey 2013, Guildford City Council
Floorspace for stores in Guildford Town Centre sourced from the Valuation Office Agency

TABLE 19: GUILDFORD BOROUGH - CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Overtrading

			2014	2019	2024	2029	2031	2033
STEP 1:	**TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):**		£209.8	£221.9	£233.8	£247.1	£252.0	£257.0
STEP 2:	**TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN BOROUGH (£ m):**		£135.1	£133.3	£133.2	£133.9	£134.1	£134.4
STEP 3:	**NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):**		£74.7	£88.5	£100.6	£113.2	£117.8	£122.6
STEP 4:	**CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m):**		£27.2	£26.9	£26.9	£27.0	£27.0	£27.1
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**		£47.5	£61.6	£73.8	£86.2	£90.8	£95.5
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**							
	Foodstore							
	i	**Estimated Average Sales Density of New Floorspace (£ per m^2):**	£12,250	£12,092	£12,079	£12,140	£12,164	£12,189
	ii	**Net Floorspace Capacity (m^2):**	-	5,098	6,108	7,103	7,464	7,831
	iii	**Assumed Net / Gross Floorspace Ratio:**	70%	70%	70%	70%	70%	70%
	iv	**Gross Floorspace Capacity (m^2):**	-	7,283	8,726	10,147	10,662	11,188
	Deep Discounter							
	i	**Estimated Average Sales Density of New Floorspace (£ per m^2):**	£6,000	£5,922	£5,916	£5,946	£5,958	£5,970
	ii	**Net Floorspace Capacity (m^2):**	-	10,409	12,471	14,502	15,238	15,989
	iii	**Assumed Net / Gross Floorspace Ratio:**	70%	70%	70%	70%	70%	70%
	iv	**Gross Floorspace Capacity (m^2):**	-	14,869	17,816	20,717	21,769	22,842

APPENDIX 11: COMPARISON CAPACITY ASSESSMENT

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2013 - 2033)

ZONE:	2014	2019	2024	2029	2031	2033	% GROWTH: 2014-33
Zone 1a:	24,105	25,232	26,113	26,979	27,293	27,580	14.4%
Zone 1b:	72,053	75,294	77,815	80,276	81,153	81,932	13.7%
Zone 1c:	18,679	19,467	20,158	20,787	21,012	21,217	13.6%
Zone 2:	50,870	52,729	54,585	56,252	56,873	57,459	13.0%
Zone 3:	106,625	110,341	113,944	116,932	118,051	119,184	11.8%
Zone 4:	118,336	122,815	127,086	131,185	132,662	134,069	13.3%
Zone 5:	68,158	70,262	72,754	75,114	75,999	76,859	12.8%
Zone 6:	44,358	45,897	47,528	48,976	49,520	50,045	12.8%
Zone 7:	108,913	112,436	115,814	118,851	119,961	121,028	11.1%
Zone 8:	23,065	23,899	24,747	25,499	25,774	26,032	12.9%
TOTAL:	635,162	658,372	680,544	700,851	708,298	715,405	12.6%
Zone 1 combined:	114,837	119,993	124,086	128,042	129,458	130,729	13.8%
Guildford Borough:	142,504	149,017	154,123	159,101	160,874	162,474	14.0%

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.
Base year population derived from mid-year ONS population estimates.
Projections are based on Experian's revised 'demographic component model'. This takes into account 2011 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas and London Boroughs. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.
Projections for Guildford Borough are based on the latest ONS Sub National Population Projections for all Local Authorities in England; released in May 2014.

TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:	2014 (incl SFT)	2014	2019	2024	2029	2031	2033	% GROWTH: 2014-33
SPECIAL FORMS OF TRADING (%):		11.7%	15.3%	16.0%	15.7%	15.5%	15.4%	
Zone 1a:	£2,912	£2,840	£3,213	£3,734	£4,408	£4,714	£5,037	77.4%
Zone 1b:	£3,431	£3,346	£3,786	£4,399	£5,193	£5,555	£5,935	77.4%
Zone 1c:	£3,925	£3,829	£4,332	£5,034	£5,942	£6,356	£6,791	77.4%
Zone 2:	£3,748	£3,655	£4,136	£4,806	£5,673	£6,068	£6,483	77.4%
Zone 3:	£3,524	£3,437	£3,889	£4,519	£5,334	£5,705	£6,095	77.4%
Zone 4:	£3,627	£3,538	£4,003	£4,652	£5,491	£5,874	£6,275	77.4%
Zone 5:	£3,879	£3,784	£4,281	£4,975	£5,873	£6,282	£6,711	77.4%
Zone 6:	£3,533	£3,446	£3,899	£4,531	£5,349	£5,721	£6,112	77.4%
Zone 7:	£3,268	£3,188	£3,607	£4,192	£4,948	£5,292	£5,654	77.4%
Zone 8:	£3,428	£3,343	£3,783	£4,396	£5,189	£5,550	£5,929	77.4%
Zone 1 combined:	£3,423	£3,338	£3,777	£4,389	£5,181	£5,542	£5,921	77.4%

Source: Average spend per capita estimates are in 2013 prices and derived from Experian *'Retail Area Planner' Reports*.

Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - *Retail Planner Briefing Note 11, October 2013).*
An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year and over the forecast period based on the research and forecasts published by Experian Business Strategies in the most recent Retail Planning Briefing Note.

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2014 - 2033 (£m)

ZONE:	2014	2019	2024	2029	2031	2033	GROWTH: 2014-33 %	GROWTH: 2014-33 £m
Zone 1a:	£68.5	£81.1	£97.5	£118.9	£128.7	£138.9	102.9%	£70.5
Zone 1b:	£241.1	£285.1	£342.3	£416.9	£450.8	£486.2	101.7%	£245.1
Zone 1c:	£71.5	£84.3	£101.5	£123.5	£133.6	£144.1	101.5%	£72.6
Zone 2:	£185.9	£218.1	£262.3	£319.1	£345.1	£372.5	100.3%	£186.6
Zone 3:	£366.4	£429.1	£514.9	£623.7	£673.5	£726.5	98.3%	£360.0
Zone 4:	£418.7	£491.7	£591.2	£720.4	£779.2	£841.3	100.9%	£422.6
Zone 5:	£257.9	£300.8	£361.9	£441.1	£477.4	£515.8	100.0%	£257.9
Zone 6:	£152.9	£179.0	£215.3	£262.0	£283.3	£305.9	100.1%	£153.0
Zone 7:	£347.2	£405.6	£485.4	£588.1	£634.9	£684.3	97.1%	£337.1
Zone 8:	£77.1	£90.4	£108.8	£132.3	£143.0	£154.4	100.2%	£77.2
TOTAL	£2,187.2	£2,565.0	£3,081.2	£3,746.0	£4,049.5	£4,369.8	99.8%	£2,182.7
Zone 1 combined:	£381.1	£450.5	£541.3	£659.3	£713.0	£769.2	101.9%	£388.2

Source: Expenditure calcualted by multiplying population (Table 1) and expenditure per capita levels (Table 2) for each zone.

TABLE 4: ALL COMPARISON GOODS TYPE SHOPPING MARKET SHARES (%) IN 2014

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
Guildford Borough	Guildford Town Centre	75.8%	71.8%	46.4%	38.9%	25.3%	8.2%	26.6%	4.7%	18.9%	46.2%	29.0%	67.8%
	Ladymead Retail Park	9.3%	10.5%	13.8%	6.5%	3.6%	1.6%	1.8%	0.9%	2.5%	5.4%	4.2%	10.9%
	Sainsbury's Clay Lane	0.6%	0.5%	0.1%	0.1%	0.0%	0.1%	0.2%	0.1%	0.0%	0.0%	0.1%	0.5%
	Tesco, Ashenden Road	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woodbridge Road	1.8%	0.5%	0.3%	2.3%	0.4%	0.3%	0.4%	0.0%	0.7%	0.8%	0.6%	0.7%
	Other Guildford Borough	0.3%	1.9%	0.5%	0.0%	0.3%	0.5%	0.1%	0.0%	1.9%	0.1%	0.7%	1.3%
	Sub-total Guildford Borough	**88.0%**	**85.2%**	**61.1%**	**47.7%**	**29.5%**	**10.6%**	**29.2%**	**5.6%**	**23.9%**	**52.5%**	**34.7%**	**81.2%**
Rest of Study Area	Aldershot	1.5%	1.1%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	28.3%	0.1%	4.7%	1.0%
	Godalming	1.8%	0.7%	16.1%	9.7%	0.0%	0.0%	0.0%	0.0%	0.4%	37.7%	2.9%	3.8%
	Horsham	0.0%	0.7%	1.2%	2.0%	0.3%	0.0%	7.3%	79.6%	0.0%	0.4%	6.8%	0.7%
	Woking	5.1%	4.3%	1.9%	0.9%	48.2%	30.1%	0.7%	0.1%	1.4%	0.4%	14.9%	4.0%
	All other in Study Area	1.0%	3.4%	9.1%	25.9%	6.9%	23.8%	30.5%	0.3%	17.8%	4.2%	15.2%	4.1%
Outside Study Area	Camberley	0.0%	0.4%	1.9%	0.6%	3.9%	2.2%	0.2%	0.0%	4.4%	0.2%	2.0%	0.6%
	Farnborough	0.0%	0.2%	0.1%	0.5%	4.0%	2.3%	0.0%	0.2%	16.4%	0.3%	3.8%	0.1%
	Kingston upon Thames	1.2%	1.9%	4.8%	1.8%	3.5%	6.8%	19.1%	0.1%	3.4%	1.9%	5.3%	2.3%
	All other outside Study Area	1.4%	2.1%	3.9%	10.6%	3.8%	24.2%	13.0%	14.1%	4.1%	2.3%	9.8%	2.3%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: **Comparison market share analysis for all types of comparison goods shopping, Appendix 5.**

12.0% 14.8% 38.9% 52.3% 70.5%

TABLE 5: ALL COMPARISON GOODS TYPE SHOPPING EXPENDITURE (£M) 2014

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£68.5	£241.1	£71.5	£185.9	£366.4	£418.7	£257.9	£152.9	£347.2	£77.1	£2,187	£381.1
Guildford Borough	Guildford Town Centre	£51.9	£173.1	£33.2	£72.3	£92.6	£34.2	£68.7	£7.1	£65.6	£35.6	£634.2	£258.2
	Ladymead Retail Park	£6.4	£25.3	£9.9	£12.1	£13.2	£6.7	£4.7	£1.4	£8.6	£4.2	£92.3	£41.6
	Sainsbury's Clay Lane	£0.4	£1.3	£0.1	£0.2	£0.2	£0.2	£0.5	£0.1	£0.0	£0.0	£3.0	£1.8
	Tesco, Ashenden Road	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
	Woodbridge Road	£1.2	£1.2	£0.2	£4.3	£1.4	£1.3	£1.0	£0.0	£2.3	£0.7	£13.5	£2.7
	Other Guildford Borough	£0.2	£4.5	£0.3	£0.0	£1.0	£2.1	£0.4	£0.0	£6.4	£0.0	£14.9	£5.0
	Sub-total Guildford Borough	**£60.2**	**£205.4**	**£43.7**	**£88.8**	**£108.2**	**£44.4**	**£75.3**	**£8.6**	**£82.9**	**£40.5**	**£758.0**	**£309.4**
Rest of Study Area	Aldershot	£1.0	£2.8	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£98.2	£0.0	£102.4	£3.8
	Godalming	£1.2	£1.6	£11.5	£18.1	£0.0	£0.0	£0.0	£0.0	£1.5	£29.1	£63.0	£14.3
	Horsham	£0.0	£1.8	£0.9	£3.7	£1.1	£0.0	£18.8	£121.7	£0.0	£0.3	£148.2	£2.6
	Woking	£3.5	£10.3	£1.3	£1.7	£176.6	£126.1	£1.9	£0.2	£4.8	£0.3	£326.6	£15.1
	All other in Study Area	£0.7	£8.3	£6.5	£48.2	£25.1	£99.5	£78.6	£0.5	£61.8	£3.3	£332.5	£15.5
Outside Study Area	Camberley	£0.0	£1.0	£1.3	£1.1	£14.3	£9.4	£0.4	£0.0	£15.1	£0.2	£42.7	£2.3
	Farnborough	£0.0	£0.4	£0.1	£1.0	£14.5	£9.6	£0.0	£0.3	£56.9	£0.3	£83.1	£0.5
	Kingston upon Thames	£0.8	£4.5	£3.4	£3.3	£12.8	£28.6	£49.3	£0.2	£11.6	£1.5	£116.0	£8.8
	All other outside Study Area	£1.0	£5.0	£2.8	£19.7	£13.8	£101.2	£33.5	£21.5	£14.4	£1.7	£214.5	£8.7
	TOTAL	£68.5	£241.1	£71.5	£185.9	£366.4	£418.7	£257.9	£152.9	£347.2	£77.1	£2,187.2	£381.1

Source: **Table 3 and Table 4**

TABLE 6: ALL COMPARISON GOODS TYPE SHOPPING EXPENDITURE (£M) 2019

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£81.1	£285.1	£84.3	£218.1	£429.1	£491.7	£300.8	£179.0	£405.6	£90.4	£2,565	£450.5
Guildford Borough	Guildford Town Centre	£61.5	£204.6	£39.2	£84.8	£108.4	£40.1	£80.1	£8.3	£76.6	£41.7	£745.3	£305.3
	Ladymead Retail Park	£7.5	£30.0	£11.6	£14.1	£15.4	£7.8	£5.5	£1.6	£10.1	£4.9	£108.6	£49.1
	Sainsbury's Clay Lane	£0.5	£1.5	£0.1	£0.2	£0.2	£0.3	£0.6	£0.2	£0.0	£0.0	£3.6	£2.2
	Tesco, Ashenden Road	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
	Woodbridge Road	£1.5	£1.4	£0.3	£5.0	£1.6	£1.5	£1.2	£0.0	£2.7	£0.8	£15.9	£3.2
	Other Guildford Borough	£0.3	£5.3	£0.4	£0.0	£1.1	£2.4	£0.4	£0.0	£7.5	£0.0	£17.5	£6.0
	Sub-total Guildford Borough	**£71.3**	**£242.9**	**£51.6**	**£104.1**	**£126.7**	**£52.1**	**£87.8**	**£10.1**	**£96.8**	**£47.5**	**£891.0**	**£365.8**
Rest of Study Area	Aldershot	£1.2	£3.3	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£114.7	£0.0	£119.7	£4.5
	Godalming	£1.4	£1.9	£13.5	£21.2	£0.0	£0.0	£0.0	£0.0	£1.8	£34.1	£73.9	£16.9
	Horsham	£0.0	£2.1	£1.0	£4.3	£1.3	£0.0	£22.0	£142.4	£0.0	£0.3	£173.4	£3.1
	Woking	£4.1	£12.2	£1.6	£2.0	£206.8	£148.1	£2.2	£0.2	£5.6	£0.4	£383.0	£17.9
	All other in Study Area	£0.8	£9.8	£7.7	£56.6	£29.4	£116.8	£91.7	£0.6	£72.2	£3.8	£389.4	£18.3
Outside Study Area	Camberley	£0.0	£1.1	£1.6	£1.3	£16.7	£11.0	£0.5	£0.0	£17.6	£0.2	£50.1	£2.7
	Farnborough	£0.0	£0.5	£0.1	£1.1	£17.0	£11.3	£0.0	£0.3	£66.5	£0.3	£97.2	£0.6
	Kingston upon Thames	£1.0	£5.4	£4.0	£3.9	£15.0	£33.5	£57.5	£0.2	£13.6	£1.7	£135.8	£10.4
	All other outside Study Area	£1.2	£5.9	£3.3	£23.1	£16.2	£118.8	£39.1	£25.2	£16.8	£2.0	£251.5	£10.3
	TOTAL	£81.1	£285.1	£84.3	£218.1	£429.1	£491.7	£300.8	£179.0	£405.6	£90.4	£2,565.0	£450.5

Source: **Table 3 and Table 4**

TABLE 7: ALL COMPARISON GOODS TYPE SHOPPING EXPENDITURE (£M) 2024

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£97.5	£342.3	£101.5	£262.3	£514.9	£591.2	£361.9	£215.3	£485.4	£108.8	£3,081	£541.3
Guildford Borough	Guildford Town Centre	£73.9	£245.8	£47.1	£102.0	£130.1	£48.2	£96.4	£10.0	£91.7	£50.2	£895.4	£366.8
	Ladymead Retail Park	£9.1	£36.0	£14.0	£17.0	£18.5	£9.4	£6.6	£1.9	£12.0	£5.9	£130.5	£59.0
	Sainsbury's Clay Lane	£0.6	£1.9	£0.1	£0.2	£0.2	£0.3	£0.8	£0.2	£0.0	£0.0	£4.3	£2.6
	Tesco, Ashenden Road	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
	Woodbridge Road	£1.8	£1.7	£0.4	£6.0	£1.9	£1.8	£1.4	£0.0	£3.2	£0.9	£19.1	£3.8
	Other Guildford Borough	£0.3	£6.4	£0.5	£0.0	£1.3	£2.9	£0.5	£0.0	£9.0	£0.1	£21.0	£7.2
	Sub-total Guildford Borough	**£85.8**	**£291.7**	**£62.0**	**£125.3**	**£152.1**	**£62.7**	**£105.7**	**£12.1**	**£115.9**	**£57.1**	**£1,070.3**	**£439.5**
Rest of Study Area	Aldershot	£1.4	£3.9	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£137.3	£0.1	£143.3	£5.4
	Godalming	£1.7	£2.3	£16.3	£25.5	£0.0	£0.0	£0.0	£0.0	£2.1	£41.0	£88.9	£20.3
	Horsham	£0.0	£2.5	£1.2	£5.2	£1.6	£0.0	£26.4	£171.4	£0.0	£0.4	£208.7	£3.7
	Woking	£4.9	£14.7	£1.9	£2.4	£248.1	£178.0	£2.7	£0.2	£6.7	£0.4	£460.0	£21.5
	All other in Study Area	£1.0	£11.8	£9.3	£68.1	£35.3	£140.5	£110.3	£0.7	£86.4	£4.6	£467.9	£22.0
Outside Study Area	Camberley	£0.0	£1.4	£1.9	£1.5	£20.1	£13.2	£0.6	£0.0	£21.1	£0.2	£60.0	£3.3
	Farnborough	£0.0	£0.6	£0.1	£1.4	£20.4	£13.6	£0.0	£0.4	£79.6	£0.4	£116.4	£0.8
	Kingston upon Thames	£1.2	£6.5	£4.8	£4.7	£18.0	£40.3	£69.2	£0.2	£16.3	£2.1	£163.3	£12.5
	All other outside Study Area	£1.4	£7.0	£4.0	£27.8	£19.4	£142.8	£47.0	£30.3	£20.1	£2.5	£302.3	£12.4
	TOTAL	£97.5	£342.3	£101.5	£262.3	£514.9	£591.2	£361.9	£215.3	£485.4	£108.8	£3,081.2	£541.3

Source: **Table 3 and Table 4**

TABLE 8: ALL COMPARISON GOODS TYPE SHOPPING EXPENDITURE (£M) 2029

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£118.9	£416.9	£123.5	£319.1	£623.7	£720.4	£441.1	£262.0	£588.1	£132.3	£3,746	£659.3
Guildford Borough	Guildford Town Centre	£90.2	£299.3	£57.4	£124.1	£157.6	£58.8	£117.5	£12.2	£111.0	£61.1	£1,089.0	£446.8
	Ladymead Retail Park	£11.1	£43.8	£17.0	£20.7	£22.4	£11.5	£8.0	£2.4	£14.6	£7.2	£158.7	£71.9
	Sainsbury's Clay Lane	£0.8	£2.3	£0.1	£0.3	£0.3	£0.4	£0.9	£0.2	£0.0	£0.0	£5.3	£3.2
	Tesco, Ashenden Road	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
	Woodbridge Road	£2.2	£2.1	£0.4	£7.3	£2.3	£2.2	£1.7	£0.0	£3.9	£1.1	£23.2	£4.7
	Other Guildford Borough	£0.4	£7.8	£0.6	£0.0	£1.6	£3.6	£0.6	£0.0	£10.9	£0.1	£25.5	£8.7
	Sub-total Guildford Borough	**£104.6**	**£355.2**	**£75.5**	**£152.4**	**£184.2**	**£76.4**	**£128.8**	**£14.8**	**£140.4**	**£69.5**	**£1,301.8**	**£535.4**
Rest of Study Area	Aldershot	£1.7	£4.8	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£166.3	£0.1	£173.6	£6.5
	Godalming	£2.1	£2.8	£19.8	£31.0	£0.0	£0.0	£0.0	£0.0	£2.5	£49.9	£108.2	£24.7
	Horsham	£0.0	£3.0	£1.5	£6.3	£1.9	£0.0	£32.2	£208.5	£0.0	£0.5	£253.9	£4.5
	Woking	£6.0	£17.9	£2.3	£2.9	£300.6	£217.0	£3.2	£0.3	£8.1	£0.5	£558.7	£26.2
	All other in Study Area	£1.2	£14.4	£11.3	£82.8	£42.8	£171.2	£134.5	£0.8	£104.7	£5.6	£569.1	£26.8
Outside Study Area	Camberley	£0.0	£1.7	£2.3	£1.8	£24.3	£16.1	£0.8	£0.0	£25.6	£0.3	£72.9	£4.0
	Farnborough	£0.1	£0.7	£0.1	£1.7	£24.7	£16.5	£0.0	£0.5	£96.4	£0.5	£141.2	£0.9
	Kingston upon Thames	£1.5	£7.9	£5.9	£5.7	£21.8	£49.1	£84.4	£0.3	£19.7	£2.5	£198.7	£15.2
	All other outside Study Area	£1.7	£8.6	£4.8	£33.8	£23.5	£174.1	£57.3	£36.8	£24.4	£3.0	£368.0	£15.1
	TOTAL	£118.9	£416.9	£123.5	£319.1	£623.7	£720.4	£441.1	£262.0	£588.1	£132.3	£3,746.0	£659.3

Source: **Table 3 and Table 4**

TABLE 9: ALL COMPARISON GOODS TYPE SHOPPING EXPENDITURE (£M) 2031

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£128.7	£450.8	£133.6	£345.1	£673.5	£779.2	£477.4	£283.3	£634.9	£143.0	£4,049	£713.0
Guildford Borough	Guildford Town Centre	£97.6	£323.6	£62.0	£134.2	£170.1	£63.6	£127.2	£13.2	£119.9	£66.0	£1,177.4	£483.2
	Ladymead Retail Park	£12.0	£47.4	£18.4	£22.4	£24.2	£12.4	£8.7	£2.5	£15.7	£7.8	£171.5	£77.8
	Sainsbury's Clay Lane	£0.8	£2.4	£0.1	£0.3	£0.3	£0.4	£1.0	£0.2	£0.0	£0.0	£5.7	£3.4
	Tesco, Ashenden Road	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
	Woodbridge Road	£2.3	£2.3	£0.5	£7.9	£2.5	£2.4	£1.9	£0.0	£4.2	£1.2	£25.1	£5.1
	Other Guildford Borough	£0.4	£8.4	£0.6	£0.0	£1.8	£3.9	£0.7	£0.0	£11.8	£0.1	£27.5	£9.4
	Sub-total Guildford Borough	**£113.2**	**£384.1**	**£81.7**	**£164.8**	**£198.9**	**£82.6**	**£139.4**	**£16.0**	**£151.6**	**£75.1**	**£1,407.3**	**£579.0**
Rest of Study Area	Aldershot	£1.9	£5.2	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£179.6	£0.1	£187.5	£7.1
	Godalming	£2.3	£3.0	£21.4	£33.5	£0.0	£0.0	£0.0	£0.0	£2.7	£53.9	£117.0	£26.7
	Horsham	£0.0	£3.3	£1.6	£6.8	£2.0	£0.0	£34.8	£225.5	£0.0	£0.5	£274.6	£4.9
	Woking	£6.5	£19.3	£2.5	£3.1	£324.6	£234.7	£3.5	£0.3	£8.7	£0.6	£603.8	£28.3
	All other in Study Area	£1.3	£15.5	£12.2	£89.6	£46.2	£185.2	£145.5	£0.9	£113.0	£6.1	£615.4	£29.0
Outside Study Area	Camberley	£0.0	£1.8	£2.5	£2.0	£26.2	£17.5	£0.8	£0.0	£27.6	£0.3	£78.7	£4.3
	Farnborough	£0.1	£0.8	£0.1	£1.8	£26.7	£17.9	£0.0	£0.6	£104.1	£0.5	£152.5	£1.0
	Kingston upon Thames	£1.6	£8.5	£6.3	£6.1	£23.5	£53.1	£91.3	£0.3	£21.3	£2.8	£214.9	£16.4
	All other outside Study Area	£1.9	£9.3	£5.2	£36.6	£25.4	£188.3	£62.0	£39.8	£26.3	£3.2	£398.0	£16.3
	TOTAL	£128.7	£450.8	£133.6	£345.1	£673.5	£779.2	£477.4	£283.3	£634.9	£143.0	£4,049.5	£713.0

Source: **Table 3 and Table 4**

TABLE 10: ALL COMPARISON GOODS TYPE SHOPPING EXPENDITURE (£M) 2033

		ZONE 1a	ZONE 1b	ZONE 1c	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	TOTAL STUDY AREA	TOTAL ZONE 1
		£138.9	£486.2	£144.1	£372.5	£726.5	£841.3	£515.8	£305.9	£684.3	£154.4	£4,370	£769.2
Guildford Borough	Guildford Town Centre	£105.3	£349.1	£66.9	£144.8	£183.5	£68.6	£137.4	£14.2	£129.2	£71.3	£1,270.4	£521.3
	Ladymead Retail Park	£12.9	£51.1	£19.9	£24.2	£26.1	£13.4	£9.4	£2.7	£17.0	£8.4	£185.1	£83.9
	Sainsbury's Clay Lane	£0.9	£2.6	£0.2	£0.3	£0.3	£0.4	£1.1	£0.3	£0.0	£0.0	£6.1	£3.7
	Tesco, Ashenden Road	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
	Woodbridge Road	£2.5	£2.4	£0.5	£8.5	£2.7	£2.5	£2.0	£0.0	£4.5	£1.3	£27.1	£5.5
	Other Guildford Borough	£0.4	£9.1	£0.7	£0.0	£1.9	£4.2	£0.7	£0.0	£12.7	£0.1	£29.7	£10.2
	Sub-total Guildford Borough	**£122.2**	**£414.3**	**£88.1**	**£177.9**	**£214.6**	**£89.2**	**£150.6**	**£17.2**	**£163.4**	**£81.1**	**£1,518.5**	**£624.6**
Rest of Study Area	Aldershot	£2.0	£5.6	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£193.5	£0.1	£202.1	£7.6
	Godalming	£2.5	£3.3	£23.1	£36.2	£0.0	£0.0	£0.0	£0.0	£3.0	£58.2	£126.2	£28.8
	Horsham	£0.0	£3.5	£1.7	£7.4	£2.2	£0.0	£37.7	£243.4	£0.0	£0.6	£296.5	£5.2
	Woking	£7.0	£20.8	£2.7	£3.4	£350.1	£253.4	£3.8	£0.4	£9.4	£0.6	£651.5	£30.5
	All other in Study Area	£1.4	£16.7	£13.1	£96.7	£49.8	£199.9	£157.2	£0.9	£121.8	£6.5	£664.2	£31.3
Outside Study Area	Camberley	£0.0	£2.0	£2.7	£2.2	£28.3	£18.8	£0.9	£0.0	£29.8	£0.3	£84.9	£4.6
	Farnborough	£0.1	£0.9	£0.2	£1.9	£28.7	£19.3	£0.0	£0.6	£112.2	£0.5	£164.4	£1.1
	Kingston upon Thames	£1.7	£9.2	£6.8	£6.6	£25.4	£57.4	£98.6	£0.3	£22.9	£3.0	£232.0	£17.7
	All other outside Study Area	£2.0	£10.0	£5.6	£39.5	£27.4	£203.3	£67.0	£43.0	£28.3	£3.5	£429.6	£17.6
	TOTAL	£138.9	£486.2	£144.1	£372.5	£726.5	£841.3	£515.8	£305.9	£684.3	£154.4	£4,369.8	£769.2

Source: **Table 3 and Table 4**

TABLE 11: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA & TOTAL FORECAST TURNOVER

	Estimated Trade Draw from Outside Study Area (Zones 1-8)	2014	2019	2024	2029	2031	2033
Guildford Town Centre	10%	£704.6	£828.2	£994.9	£1,210.0	£1,308.2	£1,411.5
Out of Centre	5%	£114.7	£134.9	£162.1	£197.1	£213.1	£229.9
Other stores in Guildford Borough	0%	£14.9	£17.5	£21.0	£25.5	£27.5	£29.7
Total Guildford Borough		**£834.2**	**£980.5**	**£1,177.9**	**£1,432.6**	**£1,548.8**	**£1,671.1**

Notes: **Trade draw based on potential expenditure from tourists and passing trade.**

TABLE 12: COMMITTED COMPARISON FLOORSPACE IN THE BOROUGH

	LPA Planning Ref	Estimated Sales Area (m^2 net)	Average Sales (£ per m^2)	2014	2019	2024	2029	2031	2033
(1) Aldi, London Road, Burpham	13/P/02028	194	£3,000	£0.6	£0.7	£0.7	£0.8	£0.8	£0.9
(2) Waitrose, York Road, Guildford	12/P/01020	488	£4,000	£2.0	£2.2	£2.4	£2.7	£2.8	£3.0
(3) 5 Woodbridge Meadows, Guildford	13/P/01318	2,604	£3,000	£7.8	£8.8	£9.8	£10.9	£11.4	£11.9
(4) 10 Sydenham Road, Guildford	12/P/01502	343	£5,000	£1.7	£1.9	£2.1	£2.4	£2.5	£2.6
(5) The Vineries, Lower Road, Effingham	13/P/01290	5,240	£1,000	£5.2	£5.9	£6.6	£7.3	£7.6	£8.0
(6) Racing Green, Lysons Avenue, Guildford	14/P/01579	1040	£2,500	£2.6	£2.9	£3.3	£3.6	£3.8	£4.0
Total Committed Floorspace		**9,909**		**£19.9**	**£22.4**	**£24.9**	**£27.8**	**£29.0**	**£30.3**

Source:

(1) Comparison net sales floorspace estimated as 20% of total net sales of 972m^2. Sales density is based on estimates from Mintel Retail Rankings (2013/14).

(2) Comparison goods net sales floorspace equates to 15% of total net sales floorspace of 1,951m^2. Sales density is based on assumptions for similar schemes.

(3) Net sales floorspace sourced from application, which equals 85% of 3,064m^2 gross floorspace (Planning & Retail Statement, Dalton Warner Davis)

(4) Net sales area is assumed at 70% of gross floorspace and occupied by a comparison goods retailer. The sales density is based on an average for a comparison goods retailer.

(5) Net sales floorspace assumed to be 80% of gross floorspace (6,550m^2). Sales density is based on typical values for a garden centre operator.

(6) Net sales floorspace estimated to be 80% of gross floorspace (1,486m^2). Sales density is based on typcial values for a furniture retailer.

TABLE 13: BOROUGH-WIDE COMPARISON GOODS CAPACITY ASSESSMENT - ASSUMING 'EQUILIBRIUM' AT THE BASE YEAR

	2014	2019	2024	2029	2031	2033
STEP 1: TOTAL FORECAST 'POTENTIAL' TURNOVER (£m):	£834.2	£980.5	£1,177.9	£1,432.6	£1,548.8	£1,671.1
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER (£m) [1]:	£834.2	£940.1	£1,044.1	£1,164.1	£1,215.8	£1,269.9
STEP 3: TOTAL FORECAST RESIDUAL EXPENDITURE:	£0.0	£40.4	£133.9	£268.5	£332.9	£401.2
STEP 4: COMMITTED FLOORSPACE -TURNOVER (£m):	£19.9	£22.4	£24.9	£27.8	£29.0	£30.3
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	**-£19.9**	**£18.0**	**£109.0**	**£240.8**	**£303.9**	**£370.9**
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:						
(i) Estimated Average Sales Density of New Floorspace (£ per m^2):	£5,000	£5,916	£6,570	£7,326	£7,651	£7,992
(ii) **Net Floorspace Capacity (m^2):**	**- 3,980**	**3,044**	**16,586**	**32,868**	**39,723**	**46,409**
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (m^2):	-	4,349	23,694	46,955	56,747	66,298

Step 1: identifies the total 'potential' turnover of all existing convenience goods floorspace at 2014 (based on Table 11). The growth in 'potential' turnover up to 2033 assumes constant market shares over the forecast period.

Step 2: sets out the total 'benchmark' turnover of existing comparison goods floorspace at 2014. Make an allowance for annual floorspace 'productivity' growth ranging from 2.0% to 2.7%.

Step 3: sets out the forecast residual expenditure capacity available to support new comparison goods floorspace over the forecast period (i.e. the difference between the 'benchmark' and 'potential' turnovers).

Step 4: identifies the forecast convenience goods turnover of all committed floorspace that had planning permission at the time of preparing this assessment a (based on Table 12). Allow for growth in 'productivity' of all committed floorspace (as above).

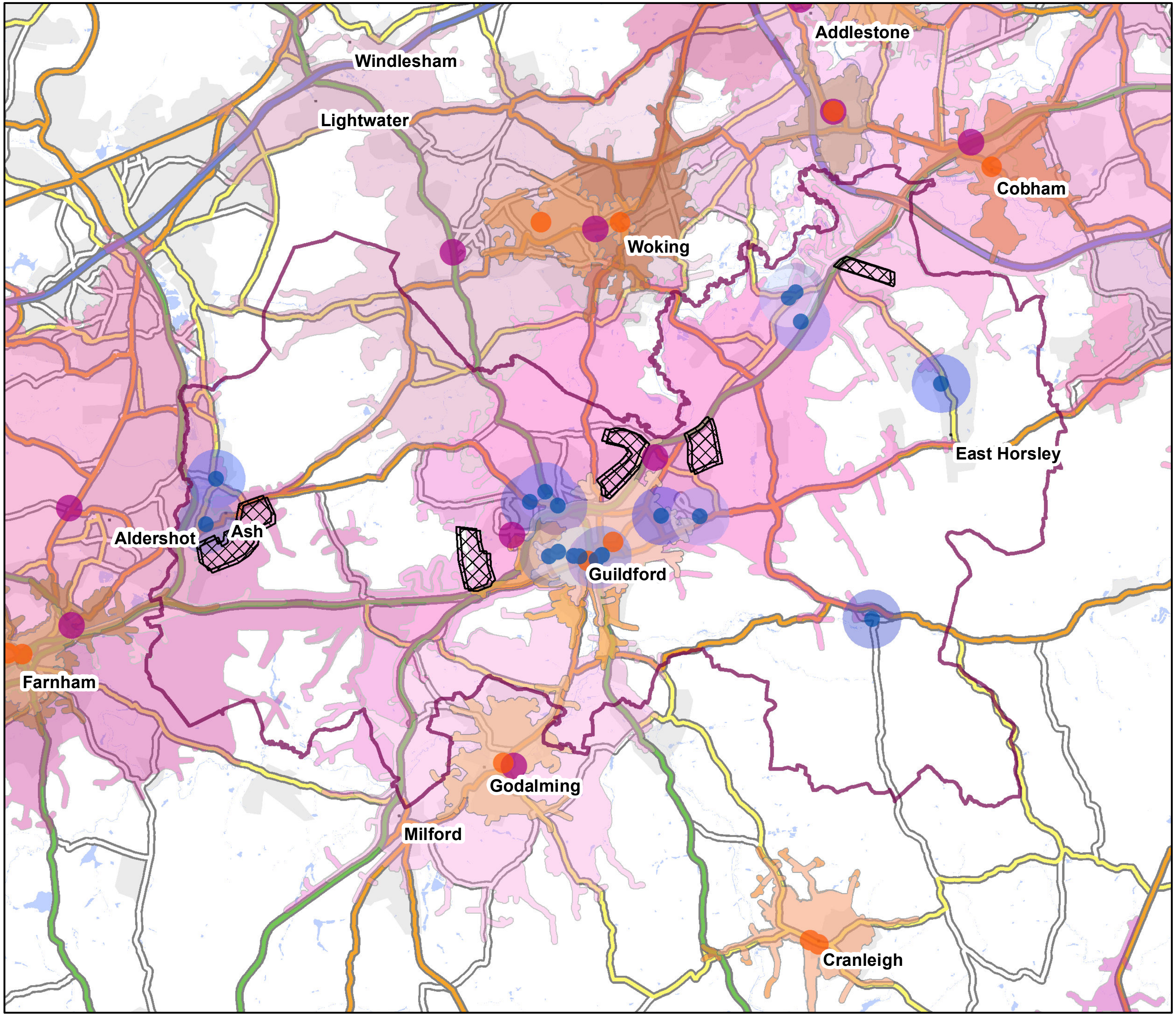
Step 5: shows the net residual expenditure available to support new comparison goods floorspace after taking account of all new commitments.

Step 6: forecasts the capacity for new comparison goods floorspace over the forecast period. The forecast residual expenditure capacity (£ million) has been converted to a net retail sales area based on an assumed average sales density for all new comparison goods floorspace of circa £5,000 per m^2 in 2014. This is informed by the average turnover levels achieved by modern retailers trading in town centre locations. Notwithstanding this, it should be noted that the average sales levels for different retailers will vary due to a range of factors, including location and the scale and quality of the different comparison goods sold.

APPENDIX 12: FOODSTORE CATCHMENT ANALYSIS PLAN

Foodstore Catchment Analysis Plan

Carter Jonas



Legend

- Superstore/ catchment (10mins)
- Supermarket/ catchment (5 mins)
- Other Convenience/ catchment (800 m)
- Strategic Housing sites/ Areas
- Guildford Borough

APPENDIX 13: LEISURE NEEDS ASSESSMENT

TABLE 1: POPULATION PROJECTIONS BY ZONE (2014-2033)

	2014	2019	2024	2029	2031	2033
Zone 1a:	24,105	25,232	26,113	26,979	27,293	27,580
Zone 1b:	72,053	75,294	77,815	80,276	81,153	81,932
Zone 1c:	18,679	19,467	20,158	20,787	21,012	21,217
Zones 2 - 8:	520,325	538,379	556,458	572,809	578,840	584,676
Total Study Area:	**635,162**	**658,372**	**680,544**	**700,851**	**708,298**	**715,405**
Zone 1 Combined:	**114,837**	**119,993**	**124,086**	**128,042**	**129,458**	**130,729**

Source: **Base year population derived from 2012 mid-year ONS population estimates.**

TABLE 2: TOTAL LEISURE EXPENDITURE GROWTH 2011-2033 (%)

	2014	2019	2024	2029	2031	2033
Volume growth per head (%)	2.1	1.1	1.3	1.3	1.3	1.3

Source: Average spend per capita estimates for each zone are derived from Experian *'Retail Area Planner' Reports (2013 Prices)*
Notes: Annual expenditure growth forecasts are informed by Experian's *Retail Planner Briefing Note 12 (October 2014).*

TABLE 3: LEISURE EXPENDITURE PER CAPITA (£m) 2013

	Accommodation	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational and sporting services	Restaurants, cafes etc	Total
Zone 1a:	£191	£334	£111	£120	£160	£1,331	£2,248
Zone 1b:	£165	£347	£143	£119	£157	£1,216	£2,147
Zone 1c:	£205	£408	£151	£141	£207	£1,404	£2,517
Zones 2 - 8*:	£178	£378	£154	£129	£178	£1,289	£2,306
Total Study Area*:	**£185**	**£367**	**£140**	**£127**	**£176**	**£1,310**	**£2,304**
Zone 1 Combined*:	**£187**	**£363**	**£135**	**£127**	**£175**	**£1,317**	**£2,304**

Notes: * Average expenditure per capita

TOTAL 4: TOTAL COMMERCIAL LEISURE EXPENDITURE PER HEAD (£)

	2014	2019	2024	2029	2031	2033
Zone 1a	£2,296	£2,470	£2,630	£2,805	£2,879	£2,954
Zone 1b	£2,192	£2,359	£2,511	£2,679	£2,749	£2,821
Zone 1c	£2,570	£2,765	£2,944	£3,140	£3,223	£3,307
Zones 2 - 8*:	£2,330	£2,508	£2,670	£2,848	£2,922	£2,999
Total Study Area*:	**£2,337**	**£2,515**	**£2,677**	**£2,856**	**£2,931**	**£3,007**
Zone 1 Combined*:	**£2,352**	**£2,531**	**£2,695**	**£2,875**	**£2,950**	**£3,027**

Notes: * Average expenditure per capita

TOTAL 5: TOTAL COMMERCIAL LEISURE EXPENDITURE (£m)

	2014	2019	2024	2029	2031	2033
Zone 1a	£55.3	£62.3	£68.7	£75.7	£78.6	£81.5
Zone 1b	£157.9	£177.6	£195.4	£215.0	£223.1	£231.1
Zone 1c	£48.0	£53.8	£59.3	£65.3	£67.7	£70.2
Zones 2 - 8:	£1,227.0	£1,366.4	£1,503.5	£1,651.0	£1,712.1	£1,774.6
Total Study Area:	**£1,488.3**	**£1,660.1**	**£1,826.9**	**£2,007.0**	**£2,081.4**	**£2,157.3**
Zone 1 Combined:	**£261.3**	**£293.8**	**£323.4**	**£356.0**	**£369.3**	**£382.7**

Notes: Table 1 and Table 3

TOTAL 6: EATING & DRINKING OUT EXPENDITURE PER HEAD (£)

	2014	2019	2024	2029	2031	2033
Zone 1a	£1,359	£1,463	£1,557	£1,661	£1,705	£1,749
Zone 1b	£1,242	£1,336	£1,423	£1,517	£1,557	£1,598
Zone 1c	£1,433	£1,542	£1,642	£1,751	£1,797	£1,844
Zones 2 - 8*:	£1,316	£1,416	£1,508	£1,609	£1,651	£1,694
Total Study Area*:	£1,330	£1,432	£1,524	£1,626	£1,668	£1,712
Zone 1 Combined*:	**£1,345**	**£1,447**	**£1,540**	**£1,643**	**£1,686**	**£1,730**

Notes: * Average expenditure per capita

TOTAL 7: TOTAL EATING & DRINKING OUT EXPENDITURE (£M)

	2014	2019	2024	2029	2031	2033
Zone 1a	£32.8	£36.9	£40.7	£44.8	£46.5	£48.2
Zone 1b	£89.5	£100.6	£110.7	£121.8	£126.4	£130.9
Zone 1c	£26.8	£30.0	£33.1	£36.4	£37.8	£39.1
Zones 2 - 8:	£680.6	£757.8	£833.9	£915.8	£949.7	£984.4
Total Study Area:	**£829.6**	**£925.3**	**£1,018.4**	**£1,118.8**	**£1,160.3**	**£1,202.7**
Zone 1 Combined:	**£149.0**	**£167.5**	**£184.5**	**£203.0**	**£210.7**	**£218.3**

Notes: Table 1 and Table 6

TOTAL 8: GAMES OF CHANCE PER HEAD (£)

	2014	2019	2024	2029	2031	2033
Zone 1a	£113.2	£121.8	£129.7	£138.3	£142.0	£145.7
Zone 1b	£145.8	£156.9	£167.0	£178.1	£182.8	£187.6
Zone 1c	£154.2	£165.9	£176.6	£188.4	£193.4	£198.4
Zones 2 - 8*:	£157.3	£169.2	£180.2	£192.2	£197.2	£202.4
Total Study Area*:	**£147.5**	**£158.7**	**£169.0**	**£180.2**	**£185.0**	**£189.8**
Zone 1 Combined*:	**£137.7**	**£148.2**	**£157.8**	**£168.3**	**£172.7**	**£177.2**

Notes: * Average expenditure per capita

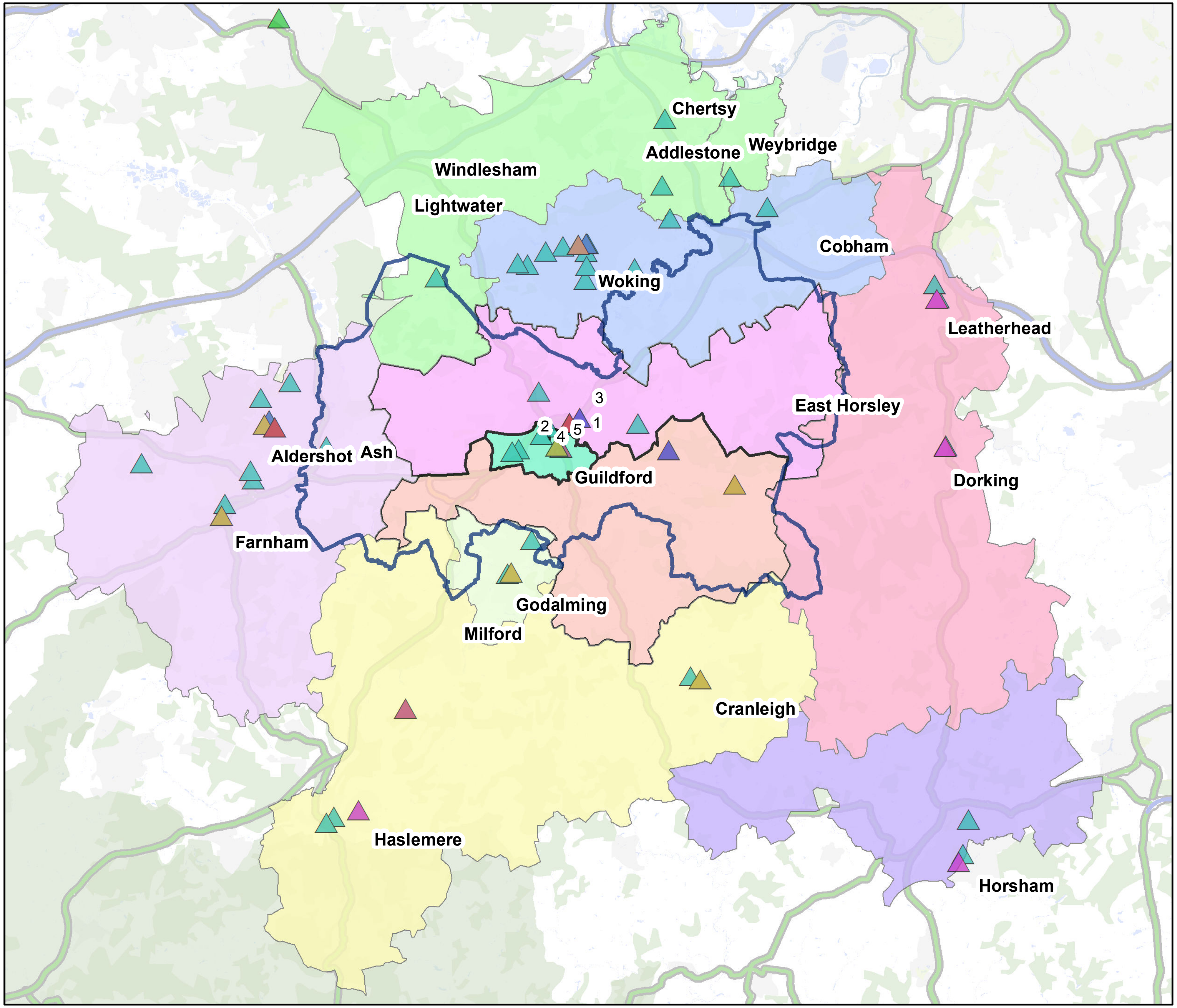
TABLE 9: TOTAL GAMES OF CHANCE EXPENDITURE (£M)

	2014	2019	2024	2029	2031	2033
Zone 1a	£2.7	£3.1	£3.4	£3.7	£3.9	£4.0
Zone 1b	£10.5	£11.8	£13.0	£14.3	£14.8	£15.4
Zone 1c	£2.9	£3.2	£3.6	£3.9	£4.1	£4.2
Zones 2 - 8:	£81.8	£91.1	£100.3	£110.1	£114.2	£118.3
Total Study Area:	**£97.0**	**£108.2**	**£119.1**	**£130.8**	**£135.7**	**£140.6**
Zone 1 Combined:	**£16.1**	**£18.1**	**£19.9**	**£21.9**	**£22.8**	**£23.6**

Notes: Table 1 and Table 8

APPENDIX 14: LEISURE PROVISION PLAN

Leisure Facilities in Guildford and the Study Area



Carter Jonas

Leisure Facilities

- Bingo
- Bingo and leisure
- Bowling
- Cinema
- Cinema and Theatre
- Health and Fitness
- Health and Fitness and Leisure
- Leisure/ games
- Theatre

Guildford's Key Leisure Facilities

1 G-Live
2 Odeon, Bedford Rd
3 Guildford Spectrum Leisure Complex
4 Yvonne Arnaud Theatre
5 Electric Theatre